SOUTH AFRICAN TOURIST-GENERATING MARKET RESEARCH STUDY

COMMISSIONED AND SPONSORED BY

EUROPEAN TRAVEL COMMISSION (ETC)

ASSOCIATION OF NATIONAL TOURIST OFFICE REPRESENTATIVES (ANTOR)

TOURIST BOARD OF SPAIN (TURESPAÑA)

DIRECTED AND CO-ORDINATED BY

Horacio Díaz del Barco
TURESPAÑA Market Research Director

July 2001

Introduction

This study is the result of a three-way collaboration between the following organisations, namely, the European Travel Commission (ETC), an international Brussels-based body with 32 European member countries, whose designated goal is world-wide promotion of Europe as a tourist destination, the Association of National Tourist Offices in South Africa (ANTOR), which groups together foreign Tourist Offices based in South Africa, and Spain's official Tourist Authority (TURESPAÑA), the Spanish body tasked with promoting tourism in the various tourist-generating markets.

The study, which was undertaken in response to the increasing interest aroused by the growing potential of the South African tourist-generating market, is structured in two well-defined parts. The first part corresponds to Chapters 1, 2 and 3 of the publication, and carries a description of the geographic, economic and social features of the country, as well as information of greatest interest concerning the South African tourist industry and opportunities for promotion afforded by the mass media and specialised trade fairs. This part was researched, drawn up and drafted in Johannesburg by Laura Castro Oliveira, a TURESPAÑA Scholarship Trainee, from February 2000-February 2001.

The second part, corresponding to Chapter 4, focuses on an analysis of the South African tourist-generating market, with special attention to the profile of the Europe-bound tourist. The body of this chapter is based upon field work undertaken by Managing Service Business Ltd. South Africa (MSB), a consultancy firm commissioned by the ETC and ANTOR, which targeted private individuals as well as the professional South African travel and tourism sector. The results of another, smaller-scale survey conducted by Ms. Castro Oliveira are also shown as a complement to the above field work.

Lastly, the study is completed by the addition of a series of annexes, including, among others, a list of the names and addresses of all main South African tour operators and travel agencies.

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1.1. GEOGRAPHY

Situated at the southern end of the African continent, between latitude 22º- 35º south and longitude 17º- 33º east, the Republic of South Africa covers a land surface area of 1,219,090 square kilometres. However there is only one time zone, i.e., GMT +2. The country is bounded on the west by the Atlantic Ocean, on the east by the Indian Ocean, to the north by Namibia, Botswana and Zimbabwe and to the north-east by Mozambique and Swaziland. Two sovereign states are encircled by the territory of the Republic, Lesotho wholly so and Swaziland only in part.

Given its great diversity, the contrasts marking South Africa are immediately perceptible in its disconcerting mix of cultures and languages. This selfsame variety is similarly represented in the character of the country's towns and cities, and the nature of the terrain.

Geographically, three broad areas are discernible:

- An extensive inland plateau rising to a height of over 1,200 metres, with a mild continental climate and bordered on its eastern flank by the Drakensberg mountain range. The rainfall steadily decreases the further west one ventures into the interior.
- A narrow coastal strip to the east of the Drakensberg, which includes the regions of Kwazulu-Natal, the Transkei, and the Ciskei in the Eastern Cape. Despite its relatively small area, this coastal fringe makes an important contribution to the country's agricultural production.
- The area of the Western Cape, which lies at the south-eastern tip of the country, has a typically Mediterranean climate and accounts for a good part of South Africa's production of fruit, vegetables and wine.

As in all southern hemisphere countries, winter is from June to August and summer from December to February. The mean annual temperature is around 15ºC. The hottest months tend to be January and February, while the months of July and August can be fairly cold.

The Republic of South Africa is divided into nine provinces, these being the Western Cape, Eastern Cape, Northern Cape, Free State, KwaZulu-Natal, North-East, Gauteng, Mpumalanga and Northern Provinces. Pretoria (Gauteng) is the administrative capital, Cape Town (Western Cape) the legislative capital and Bloemfontein (Free State) the judicial capital, whilst Johannesburg (Gauteng) is the country's economic and financial centre.

Main cities:

Johannesburg and Randburg (population 3.916 million)
Pretoria (population 1.08 million)
Durban and Pinetown (population 1.137 million)
Cape Town (population 2.185 million)
Port Elizabeth (population 0.854 million)
Bloemfontein (population 0.3 million)

90% of South Africa's population is estimated to live in and around the areas of greatest economic activity, comprising the cities of Johannesburg, Cape Town, Durban, Pretoria and Port Elizabeth.

Johannesburg, situated in the middle of Gauteng Province is South Africa's business and financial centre. Steel, petrochemicals and manufacturing are the leading local industries. Johannesburg is also the hub for all road, rail and air transport. Sandton is the business centre par excellence, where all major African and foreign-based companies and the nation's main banks have representative offices.

Cape Town is where most of the insurance and oil companies are based. Besides boasting textile, clothing, chemicals, plastics, machinery, timber and wine-making industries, the city is also an important port of call for merchant shipping.

Durban is the site of South Africa's leading harbour facility, which ranks ninth in the world and handles a high volume of freight. In addition, Durban is home to a thriving Indian community. Although there is a high volume of economic activity, most companies based in Durban tend to have branches in Johannesburg.

1.2. POLITICAL AND ADMINISTRATIVE ORGANIZATION

Dating from the first historic multiracial and multiparty elections held in South Africa, the country has undergone a dramatic transformation, from an apartheid regime to a democratically elected state with a multiracial government. Following the success of the second democratic elections in June 1999, which were freer, more just and more peaceful than the preceding 1994 poll, the country has seen democracy consolidated.

In the wake of the 1994 elections in South Africa, the international community restored normal diplomatic and economic relations with the new government. Since then, South Africa has been accepted as a member of the United Nations and has been re-admitted to the Commonwealth.

The chosen form of government is a Presidential Republic. The currently serving President of the Republic, elected by the National Assembly from among its members in 1999, is Mr. Thabo Mbeki.

Under the South African Constitution, the Parliament is a bicameral body elected every five years. The two chambers are the National Assembly (400 members) and the Senate (with 10 members for each of South Africa's nine constituent provinces). The seats in the National Assembly are distributed among the political parties in proportion to the votes which they obtained in each province. As a result of the outcome of the June 1999 elections, in which the African National Congress ANC obtained 66.35% of the votes and a total of 266 seats, thirteen Political Parties obtained representation in the National Assembly. The members of the Assembly subsequently elect the President, who is invested with wide-ranging executive powers, including the right to appoint the Cabinet.

The majority party in the last elections, the African National Congress (ANC), is predominantly African in membership, though it receives support from the liberal section of the white community and all races are represented in its Cabinet. The second leading party is the Democratic Party (DP), which is the largest of the socially liberal, yet economically conservative, white parties. Third in size is the Inkatha Freedom Party (IFP), which draws its major grass roots support from the Zulu population living in the rural areas of the Province of KwaZulu-Natal. This party has always favoured a policy of federalism as a means of controlling the powers of the central government, and on the economic front leans towards a free-market system. The NNP, formerly known as the National Party, governed South Africa for the 46 years preceding the 1994 elections. It was responsible for creating the policy of apartheid, although under the leadership of F.W. De Klerk, it subsequently abandoned this policy and entered into negotiations with the ANC. After the 1999 elections, it lost a great deal of its support and it present backing seems to have remained concentrated in the Western Cape. A further nine parties have managed to gain representation in the National Assembly, namely, the United Democratic Movement (DM), African Christian Democratic Party (ACDP), Freedom Front (FF), Afrikaner Eenheidsbeweging (AEB), Pan Africanist Congress (PAC), Azanian People's Organization (AZAPO), United Christian Democratic Party (UCDP), Federal Alliance (FA) and Minority Front.

Since the 1994 elections and the ratification of the new Constitution, a new federal government has undergone a process of consolidation, in which each of South Africa's nine provinces has its own institutions (Parliament, Government and Prime Minister) and a considerable degree of autonomy. The last municipal elections took place in December 2000 in all nine provinces, with the ANC winning the great majority of towns and cities.

1.3. ECONOMY

One of the main features characterising the South African economy is its duality, leading to the conclusion that there are in fact two markets: one of around 5 million whites having a high purchasing power, which allows it to enjoy a high living standard, and another of 30 million Africans with rather limited purchasing power. The mixed-race and Indian populations are positioned midway, with the mixed-race sector being closer to the Africans and the Indians closer to the whites, in terms of consumer patterns as well as purchasing power.

Following the historic 1994 elections, South Africa has witnessed a profound political and economic change in recent years, due to the resulting process of integration of the South African economy into the world economy. International confidence in the political system of government has been reinforced a posteriori, thanks to the success of the second democratic elections.

The South African economy is characterised by elements typical of all developed economies. It is, without doubt, the most advanced, best established and productive economy in Africa, with a Gross Domestic Product surpassing that of Egypt, Nigeria and Kenya combined. Its frontier with Namibia, Botswana, Zimbabwe, Mozambique, Swaziland and Lesotho, coupled with its well-developed road and rail network, provide it with the necessary platform and infrastructure for overland transport to the sub-Saharan region. In addition, the country possesses a sophisticated financial sector armed with well-developed financial institutions, including the Johannesburg Stock Exchange, which ranks among the world's leading bourses. However, the South African economy is also characterised by the symbiotic relationship which exists between a first world economy and the informal sector of a third world economy that is a legacy of apartheid.

1.3.1. Current economic data

As a result of the peaceful elections of 1994 and the amicable transition that followed, South Africa, desirous of changing the racial inequalities and fostering long-term export-oriented growth, embarked upon the transformation of its economy. The country possesses a domestic market of around USD 133.4 billion (1998), which displays a marked growth trend and is increasingly geared to free trade. Furthermore, it enjoys free access to other markets in Africa and world capital markets, well-developed financial institutions, a good communications infrastructure, cheaper labour than that available in industrialised countries across Asia, and relatively cheap power and raw materials. Nonetheless, owing to the years of isolation -reflected in an inwardly focused business and investment policy, an extremely low rate of savings, a large non-skilled workforce, and inevitably, low productivity- it is patently clear that South Africa has still a way to go before it realises its full potential.

The current president, Thabo Mbeki, has repeatedly underscored his determination to bring about a thoroughgoing in-depth reform of the South African economy, in particular by fighting crime and corruption, creating jobs, providing education, training, housing and health (including the need to counter the scourge of AIDS), stimulating economic growth and alleviating poverty.

As part of the process of opening up its economy, South Africa is developing and strengthening its business relations with the world. Accordingly, on 24 March 1999, the South African Cabinet, European Council of Ministers and European Commission approved and ratified the Trade, Development and Co-operation Agreement (TDCA) between South Africa and the EU.

Statistical Data on the Domestic Economy

	1997	1998	1999
GDP (USD Million), at current prices	135,737	122,176	119,098
Real rate of GDP growth (%)	2.5%	0.6%	1.2%
Population (in millions)	37.9	40.5	41.4
Rate of population growth (%)	2.6%	2.2%	2.2%
GDP per capita (USD)	3,599	3.177	2.288
Inflation (IPC, percentage)	8.6%	6.9%	5.2%
GNP (Atlas method)	130.2	130.4	N/A

* **Sources:** *Central Statistical Services, Reserve Bank, South African Institute of Race Relations and other sources*

Balance of Payments and Foreign Investment (USD Billion)

	1997	1998	1999
Total S.A. Exports, f.o.b.	30.4	27.3	27.9
Total S.A. Imports, f.o.b.	28.8	26.5	27.8
Trade Balance	2.5	0.89	0.05
Current Account	-1.4	-2.3	-3.4
Capital Account	4.2	2.5	2.7
Gross Reserves	5.9	5.5	5.2
Externa Debt as a percentage of GDP	30.4%	30.9%	N/A
Payment of Foreign Interest by Ratio Exports	7.8	8.6	N/A
Average Exchange Rate	4.61	5.5	6.0

* **Sources:** *Central Statistical Services, Reserve Bank, South African Institute of Race Relations and other sources*

Economic Structure

Primary sector. In 1999, the farming sector accounted for close on 3.7% of the GDP and employed 13% of the economically active population. South Africa's climatic variety favours a diversity of crops, with maize, wheat, sugar cane, fruit and vegetables being foremost. Livestock farming is the predominant activity in many rural areas across the country, the emphasis being on cattle and sheep. Pasture and grazing land occupies 65% of the surface area, and South Africa is the world's fourth largest producer of wool.

Secondary sector. This sector accounted for almost 24.3% of the GDP, representing 29% of the economically active population. The mining sector has played an important role in the development of the South African economy. In 1999, it contributed just under 6.5% of the GDP and accounted for almost 38% of the country's total exports. Among others, South Africa is the world's leading producer of gold, diamonds, coal and platinum. National power production covers 90% of the overall demand, with coal constituting the principal source of energy. Manufacturing shows a favourable trend, pride of place going to the chemical, machinery, food, steel, pulp and paper, and textile industries. Except for certain cases, local industry is not at all competitive, developed as it was behind protectively high tariff barriers. In 1999, the construction sector accounted for 2.9% of the GDP and provided employment for 5.3% of the economically active population.

Tertiary sector. This sector accounted for 49.9% of the economically active population and 65.5% of the 1999 GDP. Financial services and transport are the leading subsectors. In the field of transport and communications, South Africa has a good local infrastructure and an adequate network of links, both with neighbouring countries and the principal international markets. Tourism, for its part, has undergone swift development over the past few years.

The following chart reflects the GDP by standard classification of industry (SIC), expressed in current prices (1998):

SIC Division	VALUE	%
Manufacturing, Construction, Mining and Quarrying, and Energy Industries	34,009.61	25.50
Retailing and Tourism	20,059.99	15.04
Finance, Insurance and Corporate Services	19,325.46	14.49
General government services	17,845.04	13.38
Mining and Quarrying	12,963.66	9.72
Transport and Communications	9,909.47	7.43
Agriculture, Forestry and Fishing	7,041.99	5.28
Electricity, Gas and Water	5,828.31	4.37
Construction	4,641.31	3.48
Other	1,747.16	1.31
GDP	133,371.00	100.00

** Millions of USD* *Source: Business Guide to South Africa*

Foreign trade

Total import and export figures for 1997 and 1998 are listed in the table below. As will be observed, exports are growing at faster pace than imports, with the result that the balance of payments continues to show a surplus.

	1997	1998 /1997	1998
Imports	28.179	+ 2.1%	24,115
Exports	31.196	+ 4.3%	27,272

***** Millions of USD *Source: ICEX (Spanish Institute for Foreign Trade)*

Breakdown by geographical area: the European Union, which in 1998 absorbed 44% (with Germany alone accounting for 13%) of total South African imports, United States (12%) and Japan (7%) were the main suppliers. Against this, in 1998 the United Kingdom (with a 12.3% share), United States (7%), Germany (5.2%), Japan (4.9%), Zimbabwe (4.5%) and Holland (3.9%) were the main customers.

Breakdown by product: Fundamentally, South Africa imports mechanical and electrical machinery, petroleum and petroleum oils, computer equipment, transport equipment, transmission and automotive components, and exports gold, diamonds, platinum, coal, other minerals and farm products.

The Banking System and Foreign Exchange

South Africa's central bank is the South African Reserve Bank (SARB). The South African financial system is extremely well developed and supplies services normally found in the most advanced financial markets. At present, South Africa has 32 commercial banks, 7 of which are also merchant banks, plus 5 building societies. Alongside the private banking sector, there are also public corporations that furnish additional financing facilities.

In the late eighties, the sector underwent restructuring and retrenchment, and a phase of mergers and acquisitions. As a consequence of this process, the country's four main banks - Stanbic, ABSA, First National Bank FNB and Nedcor- currently control 80% of all assets of the commercial and leading merchant banks.

Ten foreign banks now operate in the country and of these, ABN Amro Bank, Internationale Nederlanden, Citibank and Commerzbank are the most prominent.

Exchange control was introduced in South Africa prior to the Second World War. Since 1994, great advances have been made in flexibility, including the abolition of the Financial Rand in March 1995. At present, administration of foreign exchange comes under the Exchange Control Department of the South African Reserve Bank.

The national currency is the Rand, which is designated by the symbol "R", divided into 100 cents and issued in bank notes in denominations of 10, 20, 50, 100 and 200 rands. At the time of issuing this study the rate of exchange as regards the Euro was 1 Euro = 6.86 Rand.

1.3.2. Influence of economic factors on travel plans

In all countries, economic factors exert a direct influence on the travel plans of the inhabitants. Wages, duties and taxes, government social policy in health, unemployment and education are the principal factors influencing people's spending patterns.

A rough guide to the average gross salaries earned by South Africans is given in the attached chart. The chart draws a distinction between salaries in the different sectors and different occupational categories according to whether individuals are employees of large corporations, small- and medium-sized enterprises or the civil service.

Account must be taken of the fact that all salaries are quoted gross and that they are subject to progressive income tax starting from a base rate of 18%, with the sole exception of wage earners who receive less than R2000 per month and are therefore exempt from tax. All low wage earners (under R76,752 p.a.) are covered by an unemployment insurance fund (UIF) and accident insurance. The UIF is financed by means of contributions from the Government, the company and the worker (the latter two being respectively obliged to pay 1% of the worker's salary, a percentage that is included in the above 18% tax levy). In the event of loss of employment or maternity leave, all workers with a minimum of 6 months' paid-up contributions to the UIF, are entitled to an unemployment benefit amounting to 45% of their salary for a maximum of 6 months. In contrast, no such unemployment benefit entitlement exists for workers whose salaries exceed the low-wage limit.

In the case of pension funds, the situation is similar. The Government has set up such a fund for civil servants. Where private enterprise is concerned, given that the South African Government offers no pension or healthcare scheme, as a rule it is the companies themselves that ensure that their employees are provided with private medical insurance. In addition, the Government offers a series of tax incentives for the setting-up of private pension funds. Contributions are generally paid in by companies and workers on a 50-50 basis (each paying 6%-7.5% of the worker's wage). On the other hand, workers on sick leave only receive their wages for a maximum of 10 days.

CORPORATE CATEGORY	OCCUPATIONAL CATEGORY	MEAN SALARIES (per month)
Major Corporations	Senior Management	R 66,000 – R 83,000
	Middle Management	
	* Financial Manager	R 50,000
	* Marketing Manager	R 40,000 – R 50,000
	* Personnel Manager (Human Resources)	R 41,000 – R 45,000
Companies and General Government Service	Senior Management	R 40,000 – R 45,000
	Middle Management	
	* Financial Manager	R 25,000 – R 34,000
	* Marketing Manager	R 25,000 – R 34,000
	* Personnel Manager	R 19,000 – R 24,000
Accounting and Clerical Staff	Accountant	R 9,000 – R 15,000
	Executive Secretary	R 6,000 – R 10,000
	Secretary with computer literacy	R 5,000 – R 6,000
	Other Secretaries	R 2,500 – R 3,500
Shop floor (average)	Foreman	R 4,000 – R 8,000
	Workers	R 2,000 – R 3,000
	Drivers	R 1,500 – R 2,500

Source: *ICEX*

In the case of families with children, another factor to be borne in mind is school fees. Schooling is compulsory from the ages of 5/6 to 16 and yet there are no public schools that are completely free. School fees were imposed in 1991 and vary, according to the school, from a minimum of R3,500 p.a. per pupil. In brief, all these factors have a decisive influence on the travel plans of potential South African tourists.

According to the International Tourism Forecast Research Report R469, drawn up in December 1997 by the London-based firm of Travel & Tourism Intelligence, tourist trends forecasts for South Africans going abroad look as follows:

YEAR	1995	2000	2005	2010
Overnight stays (million)	15	16	21	28
Expenditure in constant 1995 USD (excluding transport)	1,758	2,028	2,836	4,182

Source: *Travel & Tourism Intelligence*

It is estimated that by the year 2010, total South African expenditure abroad will represent approximately 0.4% of world expenditure, estimated at USD 921,796 million.

1.4. POPULATION

1.4.1. Population structure: different language groups

South Africa's population of approximately 43 million displays a widely varied racial composition, i.e., 76.7% African, 10.9% White, 8.9% Coloured (mixed race) and 2.6% Indian/Asian. According to censuses conducted by Statistics South Africa (Stats SA), the population registers a density of around 35 inhabitants per square kilometre and a growth rate of 2.2% per annum. At present, 52.4% of all South Africans live in and around built-up areas owing to the increase in urbanisation. Statistical data estimate the population split at 50.59% women versus 49.4% men, with an estimated life expectancy of approximately 54.7 years.
Eleven official languages are spoken in South Africa: apart from English and Afrikaans, there is Zulu 38.5%, Xhosa 11.6%, Sotho 27.2%, Tswana 6.6%, Shangaan/Tsonga 6.7%, Swazi 4.4%, Ndebele, Venda and Pedi. English is the business language par excellence. As a general rule, staff in most companies tend to be bilingual (English and Afrikaans)

Population distribution by province is as follows:

NORTHERN CAPE	2.1%
FREE STATE	6.5%
MPUMALANGA	6.9%
NORTH-WEST PROVINCE	8.3%
WESTERN CAPE	9.8%
NORTHERN PROVINCE	12.1%
EASTERN CAPE	15.5%
GAUTENG	18.1%
KWAZULU NATAL	20.7%

1.4.2. Lifestyle: educational and family-related factors

There is freedom of worship in South Africa, with the country's religions being characterised by mix of African indigenous religions (in rural areas), the Dutch Reformed Church, Anglicans, Roman Catholics, Methodists, Hindus and Jews. The relevant percentages are as follows: Christians 77%, Agnostics 19.7%, Hindus 1.7%, Islam 1.1%, Judaism 0.4% and other religions 0.1%.

As a result of the different religious customs, travel habits are also affected by the respective food and religious factors. Such tourists are interested in all types of culture-related facilities, such as restaurants serving kosher food, synagogues, vegetarian restaurants, etc.

According to Stats SA sources, the degree of literacy of the population stands at an average of 50%, with the proportion of people who claim that they know how to read declining with age, e.g., whilst the degree of literacy among persons aged 25-29 is estimated at 95%, this percentage falls to 58% among those aged 65 years or over. Similarly, there is a great difference between people living in rural and urban areas, with literacy percentages of around 38% versus 78% respectively. Moreover, whereas there are no great differences between male and female literacy at younger ages, this difference becomes more pronounced as age increases, so that among the population aged 65 years or over, percentage literacy among men is 62% versus 55% among women.

The new South African Government has realised that the key to the country's future lies in a good educational system. Primary and secondary education as well as universities and technical colleges have become the principal focus for the process of transformation. The Universities of Gauteng and Pretoria have led the way in this process, with the number of African students increasing from a few hundred in the early nineties to over 6,000 at the present time. Yet perhaps it was the University of South Africa (UNISA), the pioneer in distance (i.e., correspondence) education, that in 1946 gave those who had no possibility of attending full-time classes the opportunity of gaining access to education. Over the years, the University has had a marked influence, not only on overall literacy and culture, but also on the dissemination of a spirit of equality.

1.4.3. School Calendar and Public Holidays

The annual vacation period runs from mid-December to mid-January. After the 1997 Basic Conditions of Employment Act came into force, the paid vacation period was extended from 14 to 21 consecutive days per year of uninterrupted employment. In addition, there are 14 designated official Public Holidays in South Africa. As a general rule, whenever a Public Holiday falls on a Sunday, the Monday immediately following is deemed a holiday.

2001 official festivities:

1 January, New Year's Day
2 January, Public Holiday (in Natal and Cape Town)
21 March, Human Rights Day
13 April, Good Friday
16 April, Easter
24 April, Family Day
27 April, Freedom Day
1 May, Workers Day
16 June, Youth Day
9 August, National Women's Day
24 September, Heritage Day
25 September, Public Holiday
16 December, Day of Reconciliation
25 December, Christmas Day
26 December, Day of Goodwill

School Holidays tend to vary slightly from year to year and from one province to another. For the 2000-2001 academic year, the School Holiday calendar has been scheduled as follows:

- Free State, Gauteng, Mpumalanga, Northern and North-West Provinces:

  2/7 December - 15/22 January 2001
  31 March - 17 April 2001
  23 June - 15 July 2001
  29 September - 7 October 2001
  From 8 December 2001

- Eastern Cape, KwaZulu-Natal, Northern Cape and Western Cape:

  7 December - 22 January 2001
  7 April - 17 April 2001
  30 June - 22 July 2001
  29 September - 7 October 2001
  From 8 December 2001

2. The tourist industry in South Africa

2.1. MARKET OVERVIEW: INBOUND, DOMESTIC AND OUTBOUND TOURISM

SATOUR (South African Tourism Board), whose head office is in Johannesburg, is South Africa's official tourist authority, with responsibility for marketing South Africa as a tourist destination of choice. Its avowed goal is to make tourism one of the country's leading economic sectors.

A committee of 13 members appointed by the Minister of Environment and Tourism, Mr. Mohammed Valli Moosa, is in charge of managing the body. April 2000 saw the formation of the new committee with Mr. Saki Macozoma (General Manager, Transnet) as Chairman and Mr. Rick Menell (CEO, Anglovaal) as Deputy Chairman.

South Africa is promoted by SATOUR as an all-year-round tourist destination. The strategy employed bases its appeal on the beauty of the country's scenery, its varied wildlife, eco-tourism and the wide variety of cultures and customs of its inhabitants, without overlooking the country's potential in terms of sports, adventure and as a conference, convention and incentive venue.

In November 1999, a marketing campaign was launched to mark the new millennium, costing in the region of R 155 million and funded by both the private and public sectors. SATOUR also takes part in all major tourism trade fairs, co-ordinates advertising, assumes responsibility for public relations and direct corporate mailing and, together with other international tourist bodies, participates in educational activities.

South Africa has three international airports -Johannesburg, Cape Town and Durban- plus a number of domestic airports, the most important of which are in Port Elizabeth, East London, George, Kimberley, Upington and Bloemfontein.

Since 1994, international air traffic has risen by over 70% and the number of departing passengers by 85%. In a period of 5 years the number of landings likewise went from 59,112 to 187,423, while that of passengers soared from 3.1 to 9.5 million. The market is expected to continue growing at an annual rate of 30% until 2030 (source: Airport Company South Africa Ltd - ACSA).

South Africa is becoming one of the world's most popular tourist destinations. A study published by the World Tourism Organization (WTO) in 1998 ranked South Africa at 25 among the world's most visited destinations, up from position number 50 which it held in 1990.

Similarly, the most recent statistics indicate that the number of travellers arriving in South Africa had climbed from 5.2 million in 1996 to 5.4 million in 1997, 5.8 million in 1998 and 6 million in 1999. It should however be borne in mind here that visitors from non-African countries totalled 1.6 million, with 23% of these coming from the United Kingdom, 14% from Germany and 12% from the USA. The remaining 4.1 million came from neighbouring countries, and of these, the number representing persons residing in South Africa was very high, i.e., Lesotho 29%, Swaziland 13%, Zimbabwe 9%, Botswana 9% and Mozambique 6%.

Tourism accounted for 6.5% of the GDP in 1998, providing employment for approximately 535,000 and thus constituting an important subsector in the South African economy. If advantage is to be taken of its potential, important public investment is called for, in tandem with an effort to reduce crime countrywide and an appropriate promotion policy

In South Africa the hotel trade offers a wide range of accommodation, from traditional hotels to serviced holiday flats, private game reserves, guest houses, bed-and-breakfast establishments, etc. A full 46% of South Africa's 30,000 hotel-bed capacity lacks star-rating, 5% is rated as 1- and 2-star, 31% as 3-star, 13% as 4-star and 5% as 5-star.

Eco-tourism is the fastest-growing tourism segment, thereby lending stimulus to the development of both flora-and-fauna, and active and sports tourism.

Over recent years, Conference & Convention Tourism has witnessed substantial development in South Africa. Part of the reason for this is attributable to the transition to a democracy, a phenomenon that has been viewed with approval by the international community and has therefore led to international organizations holding their conventions in this country. The country is not only conveniently situated midway between America and the Far East, but lies at manageable distance from Europe, and represents a link with other African countries, in which organizations, such as the United Nations and others, play an important role. All this has contributed to the growth of the Convention & Conference market. At present, there are over 1,200 convention centres providing employment to more than 60,000, with revenues of close on R3 billion a year. The number of conferences held in South Africa has more than quadrupled since the 90s and the country now ranks among the world's 50 most preferred international conferences venues.

Estimates show that some 80,000 meetings and gatherings were held, though these are small events with an average of fewer than 50 participants. In 1998, the Direct Access Trend Report on the Conferencing & Meeting Industry indicated that in 59% of these events, fewer than 100 delegates took part. Along with these conferences, the number of exhibitions and trade fairs has doubled in the last few years.

SATOUR's conference promotion division is the body tasked with promoting South Africa as a venue for conferences, exhibitions and international events, and helping both customers and suppliers with their decisions.

Arrivals of foreign nationals and South African residents by purpose of visit

Purpose of visit	Year		
	1999	1998	1997
Foreign nationals			
Real data	6,026,086	5,898,236	5,170,096
Business	576,401	676,521	601,167
Vacations	4,990,566	4,731,046	4,002,354
Study	50,130	51,737	45,092
Work	74,129	81,442	86,118
Contract workers	61,443	84,755	107,681
Cross-border visitors	113,053	110,608	143,964
Transit	151,580	149,557	166,418
Unspecified	8,784	12,570	17,302

Source: *Statistics South Africa*

Arrivals of foreign nationals by country of residence

COUNTRY	FOREIGN NATIONALS Year	
	1999	1998
TOTAL	6,026,086	5,898,236
OVERSEAS TOTAL	1,540,700	1,482,327
Europe	1,026,748	981,680
North America	202,095	203,065
Central and South America	43,374	46,870
Australasia	70,307	70,333
Middle East	29,525	28,570
Asia	155,352	138,478
Indian Ocean Islands	13,299	13,331
Africa	4,353,259	4,291,547
unspecified	132,127	124,362

Source: *Statistics South Africa*

2.2. CURRENT STATUS OF THE TOURIST INDUSTRY IN SOUTH AFRICA

Going by ABSA Corporate Bank sources, in 1990, 0.3% of all shares on the Johannesburg Stock Exchange were in the hands of African males. This figure rose to 8% in 1996 and by 1997, 10% of all capital on the Johannesburg Stock Exchange belonged to the so-called Black Power Groups. It is estimated that control of part of the South African economy by a section of the African population may reach 20% by 2005. The great strength of the emerging black African market stems from this segment's enormously increased purchasing power. A Market Research Africa study reports that non white consumers accounted for 50% of all spending in 1997, compared to 40% in 1992 and 35% in 1988. Another study, undertaken by the University of South Africa, reflects that in 1996, 54% of all consumption in South Africa was ascribable to African, Coloured and Indian consumers.

While foreign travel is mostly a reserve of the white population, demand for foreign travel also exists among South Africans of Asian origin. In the light of the facts set out above, one can also speak of an emerging clientele among the African population, which accounts for 75% of the country's total population. Unfortunately, the statistics have traditionally given no breakdown by skin colour, thereby rendering quantification of the size of the market difficult.

In addition, many trips begun in South Africa by South African residents are not recorded as such, due to the fact that, aside from their South African residence and identification papers, many of these residents hold other (generally British) passports, with the result that they are officially recorded as foreign travellers.

According to the latest figures, issued by Statistics South Africa for May 2000, South Africans generally tend to travel within Africa more for business than for leisure (68.0% versus 28.2% respectively), whereas outside Africa they tend to travel more for leisure (65.5%) than for business (30.4%).

2.3. OUTBOUND TOURISM

2.3.1. Size of the South African Tourist-Generating Market

The latest statistics published by Statistics South Africa show that in May 2000 a total of 293,616 South Africans left the country temporarily, representing an increase of 3.3% on May 1999. Of this total, 108,052 (36.8%) departed by air, and of these, 61.5% (66,399) did so via the three international airports (Johannesburg, Cape Town and Durban) and duly completed the official Departure Form.

The means of transport most used by South Africans to travel abroad in May 2000 was the car (184,793; 62.9%) followed by the aeroplane (108,052; 36.8%). In the main, South Africans travelling abroad passed through the country's three international airports (Johannesburg, Cape Town and Durban).

The two main destinations chosen by South Africans in May 2000 were the United Kingdom with 14,701, accounting for 22.1% of the total, and the USA with 5,418, accounting for 8.2% of the total, followed by Germany 3,209 (4.8%), Namibia 2,785 (4.2%), Mauritius and Reunion 2,539 (3.8%), Australia 1,937 (2.9%) and Zimbabwe 1,672 (2.5%).

Although Great Britain and the USA are still the two most popular destinations with South African tourists, new destinations are now appearing and beginning to attract South Africans.

The statistical data reproduced below were drawn from Statistics South Africa. The Department of Home Affairs (DHA) is in charge of recording and compiling data on traveller cross-border traffic. As from 26 November 1993 the DHA introduced a new system, under which all South African residents travelling abroad from Johannesburg, Cape Town and Durban International Airports are required to complete a Departure Form. The system was restricted to these three airports, since they account for 97% of all international-traveller traffic, thereby making it possible for reliable information to be gathered on emigrants and South African tourists

Departures of South African residents and foreign nationals

	Year		
DEPARTURES	**1999**	**1998**	**1997**
TOTAL	9,173,752	8,405,027	7,247,347
(a) Foreign nationals - Total	5,299,077	5,042,420	4,321,621
(b) South African residents leaving temporarily	3,874,675	3,362,607	2,925,726

Source: *Statistics South Africa*

The above table shows all persons who left the country, whether by road, rail, sea or air. The following statistics consider only those South African residents who left the country via the three international airports (Johannesburg, Cape Town and Durban).

Departure of South African residents by Country of Destination (Johannnesburg. Cape Town and Durban Airports) - I

COUNTRY	1998							1999				
	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May
Total	79,950	62,519	59,502	67,632	60,436	56,018	81,751	69,511	44,429	68,502	58,928	68,340
Europe	35,335	24,180	23,744	25,799	18,169	15,846	25,833	21,818	13,704	21,233	20,424	27,705
Austria	641	486	478	465	296	214	1,243	806	427	512	350	654
Belgium	729	418	423	451	482	286	354	356	275	433	338	557
Denamark	220	130	155	142	121	91	108	98	48	95	147	139
France	2,680	1,433	799	1,299	1,035	693	884	753	568	883	864	1,337
Germany	3,111	1,918	1,962	2,558	2,044	1,531	2,134	1,917	1,419	2,096	1,972	2,808
Greece	1,386	978	1,008	1,045	431	366	339	324	179	390	443	736
Irelanda	413	330	331	289	225	330	276	251	141	239	266	339
Italy	1,564	1,036	961	1,417	697	463	1,013	743	490	660	749	1,147
Netherlands	1,860	1,127	1,195	1,308	1,032	788	1,168	960	563	906	959	1,352
Portugal	2,200	1,413	1,529	1,199	758	464	1,271	600	454	698	695	1,106
Spain	893	401	374	775	484	313	466	300	241	420	387	640
Sweden	199	128	174	170	161	106	79	145	88	144	155	221
Switzerland	1,065	803	722	756	563	510	1,142	1,093	555	831	716	975
United Kingdom	17,262	12,662	12,846	13,316	9,377	9,246	14,535	12,810	7,887	12,417	11,904	14,886
Other	1,113	917	787	609	463	445	821	662	369	509	479	808
North America	8,550	4,972	5,292	6,425	5,853	5,029	9,174	6,563	3,465	5,963	5,489	6,937
Central and Southamérica	519	473	473	469	816	748	879	527	429	527	561	621
Australasia	2,567	2,954	2,183	2,597	3,401	4,014	5,282	4,895	2,782	4,311	3,156	2,372
Middle East	3,235	2,503	2,380	3,267	2,929	2,139	6,042	3,764	3,792	3,702	1,971	2,290
Asia	4,865	3,956	5,439	6,200	5,448	8,043	6,471	3,483	6,238	4,696	4,146	5,427
Indian Ocean Islands	2,968	3,553	2,735	3,101	2,179	2,416	4,825	3,101	1,609	3,558	2,843	2,646
Africa	14,434	13,618	13,073	13,630	14,913	14,932	13,839	16,369	10,494	16,256	14,138	15,054
Others	7,476	6,019	5,666	6,905	5,976	5,446	7834	6,003	4,671	6,714	5,650	6,569

Source: *Statistics South Africa*

Departure of South African residents by Country of Destination (Johannnesburg, Cape Town and Durban Airports) - II

COUNTRY	Año 1999							Año 2000				
	Jun.	Jul.	Aug.	Sep.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May
TOTAL	102,272	70,763	52,207	51,680	44,201	40,047	54,588	57,046	50,635	55,613	63,971	66,399
EUROPE	46,010	26,486	20,345	20,437	16,559	11,769	18,806	20,248	15,540	17,787	21,831	27,776
AUSTRIA	1,031	543	418	362	167	159	998	744	611	590	318	377
BELGIUM	966	588	439	411	197	237	285	302	275	409	403	488
DENMARK	356	179	121	90	82	77	78	83	76	96	68	131
FRANCE	2,257	1,147	676	841	1,099	470	658	815	630	889	1,027	1,377
GERMAY	4,152	2,179	1,697	1,977	1,273	1,039	1,417	1,671	1,522	1,588	1,643	3,209
GREECE	1,959	1,128	856	615	180	144	271	166	201	309	363	795
IRELAND	578	393	266	270	222	155	268	298	197	247	277	435
ITALY	1,870	916	686	1,082	488	408	721	658	585	646	1,084	1,444
NETHERLANDS	2,193	1,272	1,049	976	580	591	738	868	610	831	1,077	1,470
PORTUGAL	2,315	1,258	897	658	380	406	1,260	397	369	928	730	858
SPAIN	1,165	507	458	604	301	240	401	231	204	473	627	730
SWEDEN	507	241	159	153	83	76	78	121	109	117	155	236
SWITZERLAND	1,361	766	635	560	436	356	801	832	667	1,049	728	786
UNITED KINGDOM	23,935	14,436	11,251	11,292	10,753	7,098	10,346	12,553	9,061	9,047	12,753	14,701
OTHER	1,365	933	737	546	318	313	486	509	423	568	578	739
NORTH AMERICA	10,843	6,537	4,957	4,893	3,632	3,872	5,733	5,916	3,854	4,817	6,080	6,342
CENTRAL AND SOUTH AMERICA	677	472	421	467	422	483	538	647	614	545	714	602
AUSTRALASIA	3,472	3,162	1,925	1,895	2,092	3,013	3,273	3,673	3,275	3,584	3,741	2,492
MIDDLE EAST	4,178	3,000	2,047	2,210	1,473	1,261	4,374	3,123	3,517	2,779	2,398	2,472
ASIA	5,427	4,831	3,054	3,668	3,736	3,758	3,850	4,232	4,328	5,110	5,645	4,131
INDIAN OCEAN ISLANDS	3,510	3,368	1,986	2,398	1,800	1,538	2,573	2,112	1,845	2,480	3,358	2,701
AFRICA	18,896	16,175	12,248	9,889	9,508	10,088	9,645	11,416	12,315	12,764	13,406	12,917
OTHERS	9,259	6,732	5,224	5,823	4,979	4,265	5,796	5,679	5,347	5,747	6,797	6,966

Source: *Statistics South Africa*

2.3.2. Travel requirements. Visas

Diplomatic missions and consulates of Schengen Treaty signatory countries issue short-term visas, permitting entry to all Schengen states. Even so, the total period of any such stay may in no case exceed the number of days requested by the passenger, is deemed to run from the day of first entry and is subject to a maximum of 3 months. Such a visa may however be issued for one or more entries, depending upon the purpose of the visit. Where the applicant travels frequently to one or more Schengen Treaty states, a short-term visa may be issued for multiple entries over a longer period, though in no case may the total duration of the stays exceed 3 months in any 6. Should a visa be issued subject to territorial restrictions, this will permit the holder of same to enter only those Schengen states specified therein. Where a transit visa is issued for one, two or - in exceptional cases- multiple transits, the duration of each such transit may in no case exceed five days.

Authorities issuing Schengen visas need an average of 7 days to process and issue same. Accordingly, all applicants are recommended to submit their application forms at least 10 days prior to their scheduled date of travel. The cost of such visas varies slightly, depending upon the issuing authority.

All remaining non-Schengen Treaty diplomatic missions and consulates will issue visas for their countries only, in accordance with their own rules and regulations.

Under the latest regulations, all visa applicants are required to submit a passport validly issued and in force for a minimum period of 3 months, plus a copy of their return ticket and itinerary. Any visa issued by Embassies of Schengen Treaty signatory states will also be deemed valid vis-à-vis all throughout the Schengen countries.

British passport holders do not require a visa except where their passport is endorsed, “British Citizen Abroad”. Permanent residents who are Irish or British nationals must provide proof of residence on their return to the country.

South African citizens travelling on foreign passports do not require a South African exit permit. However, such a passport may only be used to enter and exit the country of origin of same. Should they wish to travel to a country other than the country of origin of their passport, they must do so with their South African passport, or obtain a letter of permission from the DHA to travel with two different passports. Moreover, they will be required to provide proof of South African nationality on their return to South Africa.

As far as public health requirements are concerned, travellers and tourists require no vaccination for entry into any EU country.

2.4. TOURIST-GENERATING TRAVEL AGENCIES IN SOUTH AFRICA

ASATA (Association of South African Travel Agencies) encompasses all the country’s leading travel agencies. With approximately 400 member agencies nation-wide, the association deals with all types of tourist-related matters affecting its members. Among its most prominent member agencies, in terms of both number of branches and turnover, are: Rennies Travel, American Express Travel, Harvey World Travel, Concord Travel, Connex Travel, Pentravel, SAA City Center, Seekers, World Travel and Sure Travel. A list of ASATA-member retail travel agencies will be found in the annexe hereto.

A brief profile of some of the most important retail travel agencies operating in South Africa is given below.

AMERICAN EXPRESS TRAVEL

American Express Travel is one of the world's leading tourism companies. Founded some 150 years ago, it now has a network of over 1,700 offices in 130 countries. Set up in South Africa as a franchise over 40 years back, it has since become one of the largest agencies specialising in business tourism and currency exchange, with travel agencies and bureaux de change in all the country's major towns and cities. American Express South Africa was recently bought by the Tourvest Group (Tourism Investment Corporation Limited).

HARVEY WORLD TRAVEL

Harvey World Travel opened its first office in Australia en 1951 and now ranks as one of the largest retail travel agency chains, with over 420 branches scattered across Australia, New Zealand and South Africa. Although the group was set up in South Africa only recently, it already has over 50 agencies countrywide and is showing a profit.

RENNIES TRAVEL

Since opening its doors in 1954, Rennies Travel has become one of the best-known retail travel agencies in South Africa. The chain offers tourist services and foreign currency exchange geared to both business travellers and holidaymakers. At present, Rennies Travel is a subsidiary of the Bidvest Group, a financial group publicly quoted on the Johannesburg Stock Exchange. It has over 53 retail travel agencies and 79 bureaux de change countrywide, as well as 60 in-house offices serving the country's major companies and offering agency services to business travellers. In 1995, Rennies Travel entered an alliance with BTI (Business Travel International), one of the biggest travel companies in the world, thereby ensuring that its clients would receive attention at any of the latter's 2,750 branches around the globe. It likewise maintains a close working relationship with Thomas Cook in respect of the latter's financial services, an arrangement that not only affords access to the 2000 or so agencies run by Thomas Cook in over 120 countries, but gives Rennies the sole and exclusive right to sell Thomas Cook traveller's cheques in South Africa. In addition, it has business links with Harvey World Travel, Concorde Travel, Connex Travel and World Travel.

2.5. TOURIST-GENERATING TOUR OPERATORS IN SOUTH AFRICA

While most tour operators channel their products through travel agencies, they are also in direct contact with the public. This is particularly true in the case of those that possess their own agency network and, above all, in cases involving groups, conventions and incentive travel. Furthermore, tour operators tend to join trade bodies and organizations that safeguard their interests, such as SATOUR, ASATA, IATA, SATSA, etc. A list of ASATA-member tour operators will be found in the annexe hereto

Prominent among the tour operators that promote and market Europe are: Thompsons Tours, Top Holidays, Absolute Tours, Azure Travel and ATO (Associated Tour Operators). Some of the South African tour operators of most relevance to the European market are briefly profiled below

THOMPSONS TOURS

Set up in 1978, the Thompsons Tours and Travel Group is currently one of leading leisure travel groups in Africa. With offices in Johannesburg, Durban, Cape Town, Port Elizabeth and Hazyview, and over 400 employees, the company, which belongs to Cullinan Holdings Ltd, is quoted on the Johannesburg Stock Exchange.

This tour operator offers a wide range of tourist services for both domestic and international tourism. In the field of international tourism, it provides all manner of leisure, tour and miscellaneous services at leading tourist destinations around the world. According to Ms. Wendy Grandmaison, European Area Manager, in the year 2000 a total of 17,648 passengers travelled to Europe through Thompsons Tours.

TRAVEL VISION

Founded in 1979 and based in Johannesburg, this tour operator provides tourist services to retail agencies across the country and has grown at a dynamic pace in recent years. It acts as South African Airways’ tour operator of preference, as a partner to Rennies Travel and as the main supplier to the Sure Travel Group. It is a member of IATA (International Air Travel Association), ASATA (Association of Southern African Travel Agents), a founder member of SATOA (South African Tour Operators Association) and member of TIA (Travel Industry Association of America). As one of the leaders in the European market, and in London in particular, it offers a wide choice of hotels and holiday flats, along with car hire. According to Travel Vision Manager, Mr. René Bongers, some 6,000 tourists travelled to Europe in the year 2000.

ATO

Associated Tour Operator (ATO) boasts a 34-year track record in the South African market. It has close links with airline companies, hotels, cruise lines, coaches and trains, offering a diversity of products spanning a wide range of destinations. The Mediterranean and Europe are two of its most important destinations. Package tours, accommodation and car hire are some of its products, along with coach tours around the UK and Europe.

TOP HOLIDAYS

With over 10 years in the South African market, Top Holidays is one of the best-known tour operators in the tourism world for its package tours to Mediterranean destinations.

ABSOLUTE TOURS

This is another tour operator specialising in the European market, is also a registered member of SATOA (South African Tour Operators Association) and has close ties with Iberia, South African Airways, KLM, British Airways, Olympic Airways and Virgin Atlantic.

RCI

This group was founded in the USA in 1974 and as the pioneer in the time-share sector has since grown rapidly. RCI South Africa has its head office in Johannesburg and other branches in Cape Town and Durban.

2.6. TRANSPORT: DIRECT FLIGHTS BETWEEN SOUTH AFRICA AND EUROPE

At present, over fifty foreign airlines -European, Asian and African- fly to South Africa. As regards the European market, the United Kingdom (London Airport in particular) can be regarded as the entry point for most South Africans coming to Europe. The grounds for such a claim lie in the statistics shown below, which reveal that the UK is the greatest single recipient of tourists from South Africa. However, when these statistics are compared against figures for visas issued by the Embassies of the respective countries, the number of the latter is higher, leading to the conclusion that the final destination of many of these travellers must necessarily be a country other than that through which they first entered Europe.

Another factor to be borne in mind is that British Airways is the airline with the greatest number of direct flights between South Africa and Europe (London), viz., 2 flights daily from Johannesburg and 1 from Cape Town, followed by South African Airways with 5 flights daily to London, Paris and Zurich respectively, and Swissair with 2 flights daily to Zurich.

Iberia, which currently operates 3 flights weekly to Madrid, is hoping to increase this to 4 as from June 2001 and 5 as from November of the same year, according to the Iberia’s Commercial Manager for South Africa, Mr. Juan Pedro Aritio.

SCHEDULED FLIGHTS TO EUROPE FROM SOUTH AFRICA		
AIRLINE	**DESTINATION**	**FREQUENCY**
AIR FRANCE	Paris	1 flight daily
BRITISH AIRWAYS	London (departing from Johannesburg) London (departing desde Ciudad del Cabo)	2 flights daily 1 flight daily
IBERIA	Madrid	4 flights weekly (5 as from November 2001)
KLM - ROYAL DUTCH AIRLINES	Amsterdam	1 flight daily
LTU INTERNATIONAL AIRLINES	Munich	1 flights weekly (2 during austral summer)
LUFTHANSA	Franckfurt	1 flight daily
OLIMPIC AIRWAYS (OA)	Athens	2 flights weekly
SOUTH AFRICAN AIRWAYS (SA)	London (departing from Johannesburg) London (departing from Cape Town) Zurich Paris	2 flights daily 1 flight daily 1 flight daily 1 flight daily
SWISSAIR (SR)	Zurich	2 flights daily
TAP AIR PORTUGAL (TP)	Lisbon	2 flights weekly
VIRGIN ATLANTIC (VS)	London	1 flight daily

3. Promotion

3.1. MASS ADVERTISING: SPECIALIZED MAGAZINES, NEWSPAPERS AND TELEVISION PROGRAMMES.

In South Africa a wide range of services is to be found within the mass media, e.g., magazine and newspaper publishers, radio, television, cinema and the like. The communications sector has been favourably affected by the impact of new technologies and plays a crucial role in the spread of information, exchange of opinions and the creation or reaction of public opinion and fashion.

South Africa has a sophisticated advertising industry. The advertising agencies offer a comprehensive range of services and in many cases are subsidiaries of international advertising groups. The main mass media include television, radio, newspapers and magazines, billboards, cinema and the Internet.

The four leading communications industry trade associations in South Africa are: Association of Advertising Agencies (AAA), Association of Marketers (ASOM), National Association of Broadcasters (NAB) and The Print Media Association.

Association of Marketers (ASOM)
PO Box 98859 - Sloane Park 2152
Tel: (27 11) 706-1633; Fax: (27 11) 706-4151
Mr. Derrick Dickens (Executive Director)
E-mail: asom@pixie.co.za

Association of Advertising Agencies (AAA)
PO Box 2289 - Parklands 2121
Tel: (27 11) 781-2772; Fax: (27 11) 781-2796
Mr. Russell Cory (Financial Director)

The National Publishing Company (Pty) Ltd
HIS South Africa - PO Box 8147
Johannesburg 2000
Tel: (27-11) 8352221; Fax:(27-11) 8352631
Mr. Tim Gray (Executive Director)
E-mail: natpub@lia.co.za

South African newspapers and magazines tend to form part of press groups. The top four control 90% of the dailies, 30% of the newspapers sold in rural areas and 50% of all registered magazines. Until 1994, these were seen as a monopoly of the whites, but nowadays a great part of the media -both on-line and printed- is controlled and influenced by the black African consortium. The largest press groups are Independent Newspapers, Nasionale Media Beperk, Perskor and Times Media Limited.

Tourist Trade Magazines:

Among the leading magazine publishers are Nasionale Media, TML, Republican Press and Ramsay Son & Parker. There is a wide variety not only of specialist tourism publications that are circulated to the trade, but also of travel magazines that cater to the general public.

Columbus Travel Guide and **World Travel Guide**
P O Box 652222 - Benmore 2010
Tel/Fax: (27-11) 784 3966
E-mail: sasa.vacations@mweb.co.za

The GSA and Irresistible Travel Ideas
P O Box 3239 - Cape Town 8000
Tel: (27-21) 419 1671; Fax: (27-21) 419 4851
E-mail: guy@the-gsa.co.za
Frequency of publication: Monthly

Inside Travel
1 Pinedene Rd, Scott Estate - Hout Bay 7806
Tel/Fax: (27-21) 790 0600

Leisure Training Publications
P O Box 4015 - Tzaneen 0850
Tel/Fax: (27-15) 307 1270
E-mail: mwltpu@mweb.co.za

OAG
P O Box 75262 - Gardenview 2047
Tel: (27-11) 622 4600/4655; Fax: (27-11) 622 4685
E-mail: oag-subs@iafrica.com

OHG (Oficial Hotel Guide)
P O Box 84 - Cape Town 8000
Tel: (27-21) 424 2288; Fax: (27-21) 424 1166

Portfolio of Places
P O Box 52350 Saxonwold 2132
Tel: (27-11) 880 3414
Fax: (27-11) 788 4802

Thomas Cook Publications
P O Box 75262 Gardenview 2047
Tel: (27-11) 622 4600/55
Fax: (27-11) 622 4685

TIR Southern Africa (Travel Industry Review)
P O Box 3239 - Cape Town 8000
Tel: (27-21) 419 1671
Fax: (27-21) 421 5938
E-mail: travgaz@iafrica.com

Travel News Weekly
P O Box 55251 - Northlands 2116
Tel: (27-11) 327 4062
Fax: (27-11) 327 4094
E-mail: info@nowmedia.co.za

Travel magazines:

Not a great deal of travel magazines are published in South Africa. Moreover, those that are published locally tend to devote a major amount of space to tourist destinations within South Africa, other neighbouring countries and the Indian Ocean islands, with the emphasis on nature and sports tourism.

Getaway Magazine
P O Box 180 - Howard Place
Tel: (27-21) 530 3100
Fax: (27-21) 531 3846
Frequency of publication: Monthly

Out There
P O Box 1741 - Saxonwold 2132
Tel: (27-11) 280 5454
Fax: (27-11) 280 5464
Web: www.outthere.co.za

Traveller (National Geographic)
1145 17th Street – NW Washington DC

Expedia Travels
28 east 28th Street – NY 10016-793
Web: www.etravel.net

Travel Ideas
312 Rosebank Mews, 173 Oxford Rd – Rosebank

Leading newspapers in South Africa:

Five national dailies and thirteen weeklies are published in South Africa. The daily newspapers and their respective languages are as follows: Beeld (Afrikaans), Business Day (English), The Citizen (English), The Sowetan (English), The Star (English), Die Volksblad (Afrikaans). The weeklies include: City Press (English), Rapport (Afrikaans), Sunday Times (English), Sunday Tribune (English), Sunday Independent (English), Mail & Guardian (English). In addition, a number of regional newspapers are published in different areas of Johannesburg, Durban and Cape Town.

Business Day
PO Box 1746 - Saxonwold 2132
Tel: (27 11) 280-3000; Fax: (27 11) 280-5600
Daily (Monday to Friday); Circulation: 44,042
Internet: www.bday.co.za

The Star
PO Box 1014 - Johannesburg 2000
Mr. Gary Pitzer (Advertising Manager)
Tel: (21 11) 633-2417
Daily (Monday to Saturday); Circulation: 166,962
Saturday Star; circulation: 145,250
Internet: www.star.co.za

The Citizen
PO Box 7712 - Johannesburg 2000
Tel: (27 11) 402-2900; Fax: (27 11) 402-6862
Daily (Monday to Saturday); Circulation: 117,398
Saturdays; circulation: 112,016

The Sowetan
PO Box 6663 - Johannesburg 2000
Tel: (27 11) 474-3740; Fax: (27 11) 474-8834
Daily (Monday to Saturday); Circulation: 209,855

City Press
P.O. Box 3413 - Johannesburg 2000
Tel: (27 11) 402-1632 to 9; Fax: (27 11) 402-6501
Daily; circulation: 293,258

Sunday World
P.O. Box 30315 - Wibsey 1717
Tel: (27 11) 471-4200; Fax: (27 11) 474-8834
Sundays; circulation: 26,577

Sunday Tribune
P.O. Box 47548 - Greyville 4023
Tel: (27 31) 308-2911; Fax: (27 31) 308-2715
Sundays, circulation: 111,198

The Mail & Guardian
PO Box 32362 - Braamfontein 2017
Tel: (27 11) 727-7000
Weekly; Circulation: 36,555
Internet: www.mg.co.za

The Sunday Times
PO Box 1742 - Saxonwold 2132
Tel: (27 11) 280-3000; Fax: (27 11) 280-3200
Weekly; Circulation: 476,034

The Sunday Independent
PO Box 1014 - Johannesburg 2000
Tel: (27 11) 633-9111; Fax: (27 11) 836-8398
Weekly; Circulation: 42,628
Internet: www.iol.co.za

Beeld
PO Box 5425 - Johannesburg 2000
Tel: (27 11) 406-4600; Fax: (27 11) 406-4643
Daily; Circulation: 105,210
Sundays; Circulation: 91,533

Rapport
PO Box 28052 - Sunnyside 0132
Tel: (27 12) 341-0981; Fax: (27 12) 341-4620
Weekly (Sundays); Circulation 361,666

South African TV Broadcasting Corporations

There are three official channels in South Africa, all run by the South African Broadcasting Corporation (SABC), plus an entertainment channel, M-Net, accessible only on payment of a monthly subscription. Furthermore, there is satellite television (DSTV), which has been only recently introduced. In 1994, the IBA Independent Broadcasting Authority was created as an independent body protected by the Constitution and entrusted with important broadcasting-related tasks, such as the supervision of the SABC. The organization is governed by a board whose members are chosen by the public audience and appointed by the President. Although the different channels show their share of travel programmes, DSTV stands out from the pack with a channel devoted exclusively to travel.

SABC TV1 (Promotion/Advertising Dept.)
P O Box 234 - 2006 Auckland Park
Tel: (27-11) 714 6296; Fax: (27-11) 714 6232

SABC TV2 (Promotion/Advertising Dept.)
P O Box 216 - 2006 Auckland Park
Tel (27-11) 714 6756; Fax: (27-11) 714 5333

SABC TV3 (Promotion/Advertising Dept.)
P O Box 1128 - 2006 Auckland Park
Tel (27-11) 714 5455; Fax: (27-11) 714 2493

E-TV (Promotion/Advertising Dept.)
P O Box 12124 - 8010 Mill Street
Tel: (27-21) 481 4500; Fax: (27-21) 481 4510
E-mail: luisev@etv.co.za

M-NET (Cable TV)
P O Box 2963 - 2123 Pinegowrie
Tel: (27-11) 329 5555; Fax: (27-11) 329 5420

DSTV (Satellite Television)
Tel: (27-11) 289 2222
Web: www.dstv.co.za

3.2. TOURISM AND TRAVEL TRADE FAIRS, TOURIST WORKSHOPS AND SEMINARS

Over the course of the year, a number of Tourism Trade Fairs are held in South Africa. Some, such as the ICT (Incentives, Convention & Business Travel) specialise in business and convention tourism. In this regard, INDABA is the most important locally held trade fair of its type, in terms of both size and attendance, though it is characterised by mass participation of the tourist-receiving sector. Most of the foreign exhibitors consist of neighbouring nations, other African countries or offshore island possessions.

The dates of the respective trade fairs vary from year to year. For 2001 these are the trade fairs that have been programmed to date:

HOLIDAY HOLDINGS WORKSHOP
5 February – Sandton Convention Centre, Johannesburg
7 February – International Convention Centre, Durban
9 February – The Rotunda, Cape Town

Over forty airline companies and GSA ground service companies are scheduled to take part.

ICT EXPO (INCENTIVES, CONVENTIONS & BUSINESS TRAVEL)
22-24 February - Sandton Conference Centre

The first South African Expo focused on Incentives, Convention & Business Tourism and organised by SA RAI promises to be a unique and dynamic event.

GETAWAY SHOW - CAPE TOWN
6-8 April – Good Hope Centre, Cape Town

In view of the success of the trade fairs held in Johannesburg and Durban, the organisers decided to arrange another show in Cape Town, which was held for the first time in 1999. The event received some 16,608 visitors over the three days that it lasted. A year later, the number of visitors had risen to 18,960

INDABA
21-24 April - International Conference Centre, Durban

This is the most famous and important of all the tourism trade fairs held in South Africa and focuses on inbound tourism targeted at South Africa and the remaining southern African countries and islands.

INTERNATIONAL TRAVEL FAIR – JOHANNESBURG
4 -6 May 2001 –Gallagher Estate, Johannesburg

Following the success of last year's International Trade Fair in Cape Town, the conveners have decided to organise the same trade fair in Johannesburg.

INTERNATIONAL TRAVEL FAIR
31 August – 2 September – Velodrome, Cape Town

The ITF 2001, acknowledged as being highly professional, concentrates on outbound tourism targeted at Africa and the rest of the world, and attracts the tourist market interested in incentive and business travel, as well as potential tourists themselves.

GETAWAY SHOW – JOHANNESBURG
21-24 September – MTN Sundome, Johannesburg

This trade fair affords exhibitors the chance of making contact with tourists who are interested in adventure, outdoors and eco-tourism, and who, in many cases, are also readers of the tourist magazine of the same name. Held for the first time in Johannesburg in 1993, by 1999 it had become the venue for over 430 exhibitors and played host to approximately 3,147 visitors over the 4 days it was open. The Johannesburg Trade Fair is the largest of all held in Africa and received the PMR Golden Arrow Award for the "Best Exhibition of 1998"

3.3. STRATEGIES FACING THE EMERGING TRAVEL MARKET

South Africa has a well-developed communications network. Internet access and e-mail communication are widespread at both business and private levels. According to a study conducted by South Africa Online and The House of Synergy, South Africa ranks sixteenth among the world's most Internet-linked countries.

In 1998, the number of South Africans browsing the Internet grew even more rapidly than in the preceding 4 years -at a rate exceeding 100%- and had risen to 370,000 by the end of the year. Private Internet users, including those who access the Internet via corporate networks, totalled 905,000. According to a study published by Media Africa, use of Internet continues expanding in South Africa, with half a million more users in 1999 (a total of 1.82 million users) and an estimated 2.4 million by year-end 2000.

The South Africa Online and The House of Synergy study quoted above describes the profile of the typical South African Internet user as follows:

"English-speaking, married male, aged 26-30 years; secondary school or university education; income of R 10,000 – R 19,000 per month; Windows 95-user who accesses Internet both from his own home and from his workplace; job probably IT-related and has been using the Internet for 1-2 years."

The WebPages of tourist offices and other tourist concerns tend to be fairly sophisticated, and many allow for on-line reservations. South Africans are becoming increasingly more inclined to seek tourist information on and make their own bookings via the Internet.

According to an Acuity Media Africa survey, South African consumers spent R2.7 billion on Internet shopping, and E-commerce is expected to reach a figure of R4 billion this year.

For two years now the ANTOR (Association of National Tourist Offices in South Africa) School has been organising weekend courses for travel agents. To date, these courses have been held on an annual basis, but in view of their success, it is now hoped that they can be held at least twice a year. These courses provide those travel agents who are interested, with the opportunity, not only of broadening their tourist knowledge of ANTOR member states, but also of coming into direct contact with the staff of the respective tourist offices and so gaining access to all manner of tourist, audio-visual and informative material on of the various participant countries. ANTOR members are: Germany, Australia, Dubai, Egypt, France, Great Britain, Holland, India, Kenya, Malaysia, Namibia, Seychelles, Singapore, Thailand and Zimbabwe.

Most national tourist offices also tend to hold regular tourist workshops and generally have a stand at the various tourism trade fairs held around the country during the course of the year.

Similarly, tour operators, such as Thompsons Tours, usually run their own courses to enhance their agents' tourist knowledge of the different destinations. This kind of course is normally designed around the tour operator's product range.

Airline companies tend to collaborate in tourist workshops which are held by their tour operators of preference during the course of the year, with the aim of familiarising travel agents with the destinations and products that such operators market.

4. South African oubound traveller market

4.1. ETC/ANTOR STUDY: TRAVEL PREFERENCES AND PROFILE OF THE SOUTH AFRICAN TOURIST

4.1.1. Quantitative phase: interviews with individuals

Objectives

The designated goal in this phase was to identify and acquire in-depth knowledge of the needs, wishes and aspirations of the South African leisure traveller, particularly with regard to favourite types of vacations and tourist destinations, to enable the respective National Tourist Authorities to develop tourist products tailored to such needs. To this end, the following parameters were duly identified and evaluated:

- Demographic profiles of South African tourists.
- Duration of trips (one or more countries).
- Factors underlying the popularity of given types of holiday and favourite tourist destinations.
- Characteristic features of the various types of holiday and tourist destinations.
- Trends in travel over the last 3 years.
- Future types of holidays and tourist destinations for South African tourists.
- Economic conditions in South Africa and their repercussion on foreign travel.
- Effect of personal risk on trips abroad taken by South Africans.
- Use of the Internet for travel decision-making and bookings.

Methodology

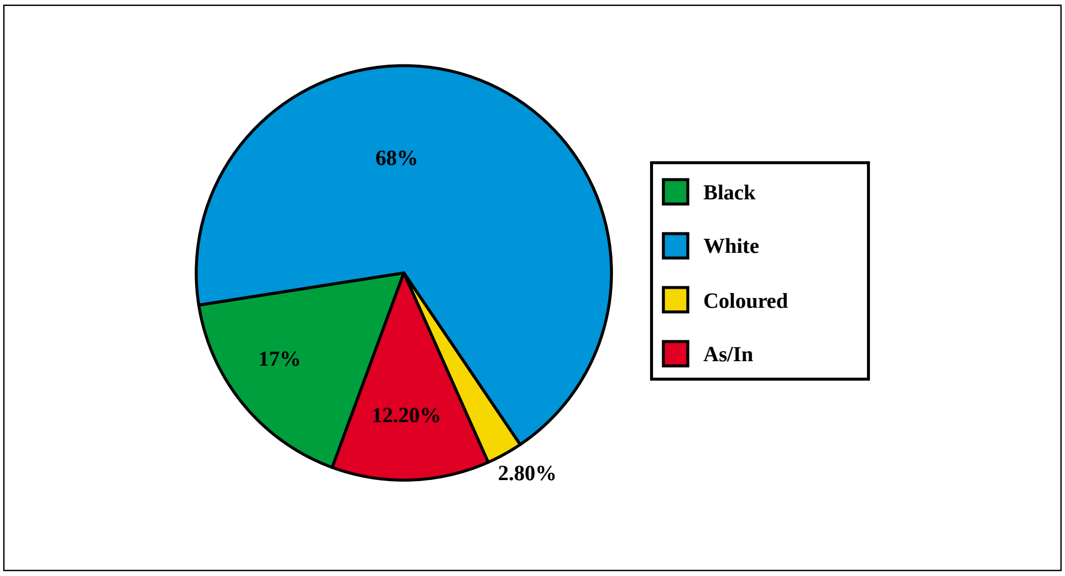
For the purposes of carrying out the above field work, a purpose-designed questionnaire was used to conduct 500 interviews, each lasting 5-7 minutes, involving travellers resident in South Africa.

All interviews were conducted at Johannesburg International Airport in the period, 16th- 27th March 2001.

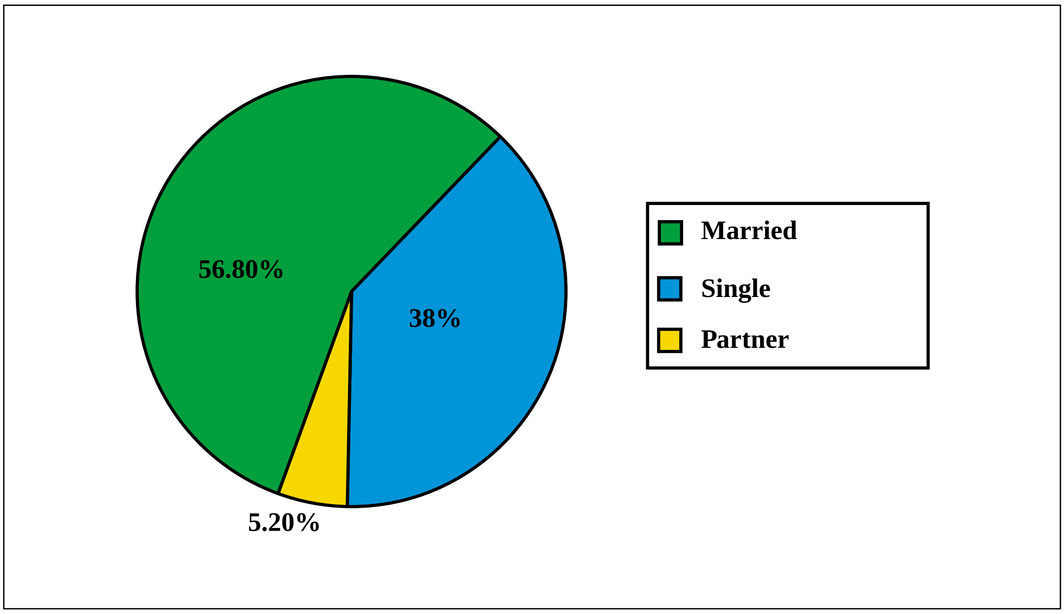
Sample

	Target	Achieved
Total	500	500
Domestic	100	100
International	400	400
Men	At least 200	250
Female	At least 200	250
Alone	At least 100	183
With partner	At least 100	129
With children	At least 100	129
< 24	At least 100	110
25 – 34	At least 100	143
35 – 49	At least 100	134
50 +	At least 100	113

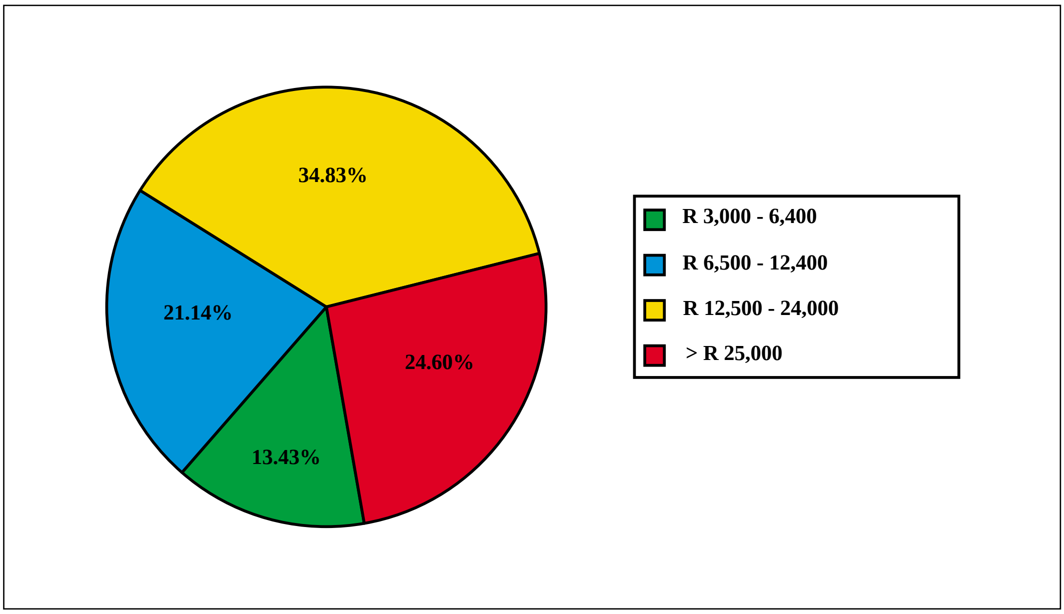
a) Race



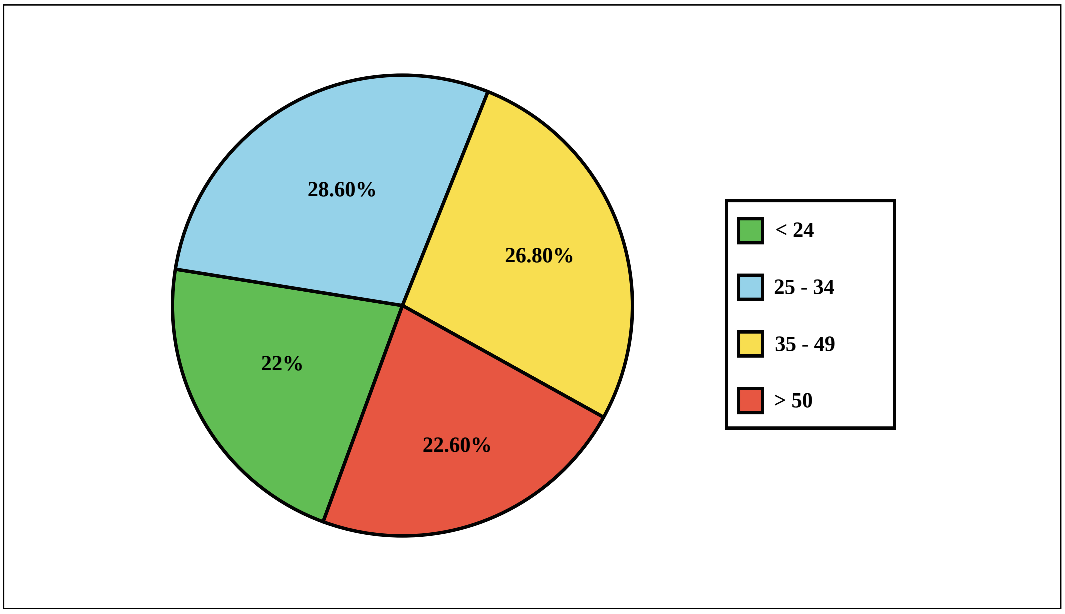
b) Marital Status



c) Income



d) Age



Reasons for Travel

INTERNATIONAL TRAVELLERS

1.	33%	Business
2.	46%	Leisure
3.	34%	VFR
4.	3%	Other

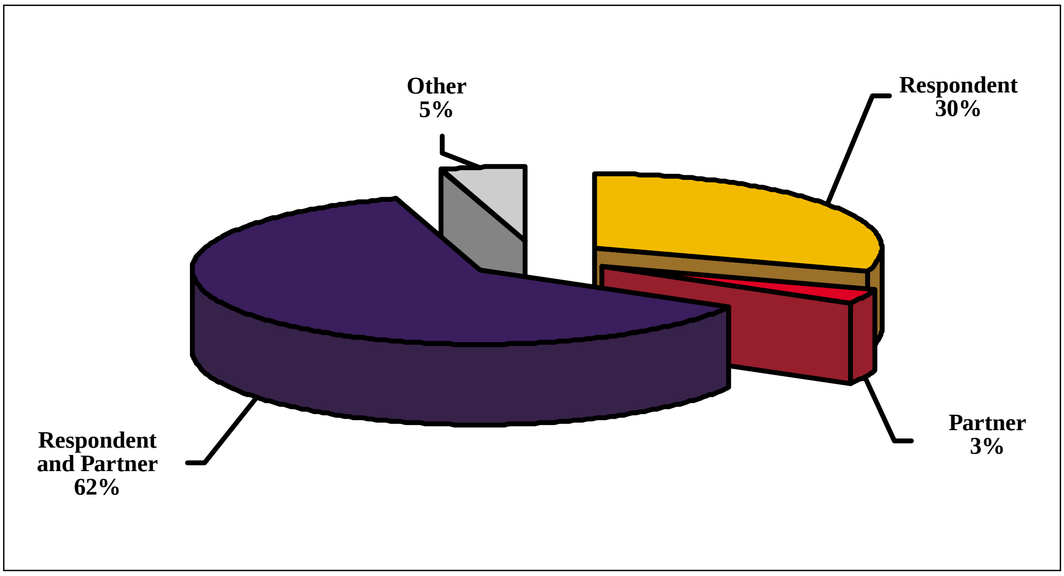
DOMESTIC TRAVELLERS

1.	45%	Business
2.	29%	Leisure
3.	29%	VFR

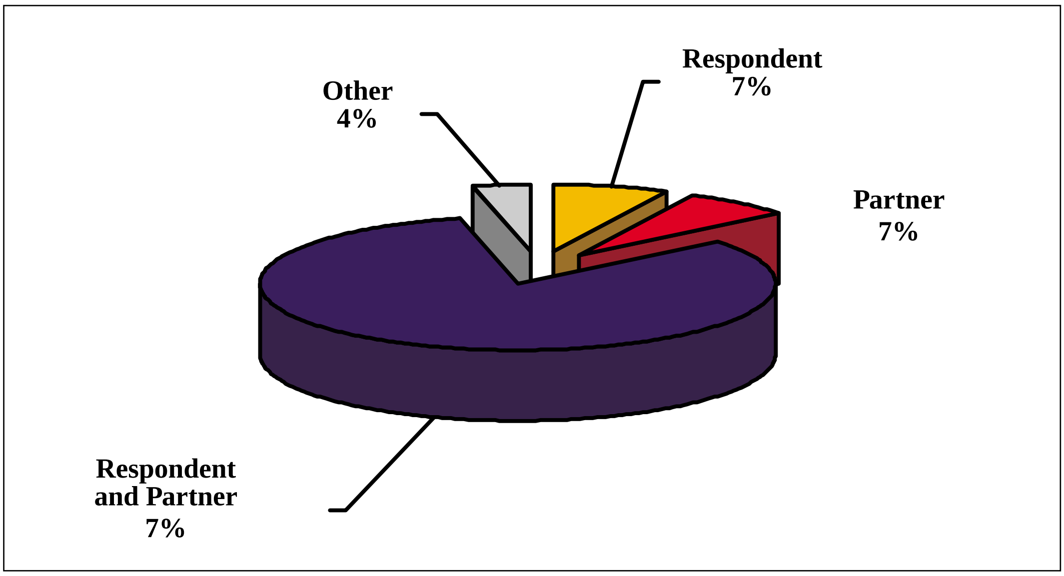
Decision makers

This point is related to the question: Who has taken the decision of travelling?. It is only applied to those who travel with a partner.

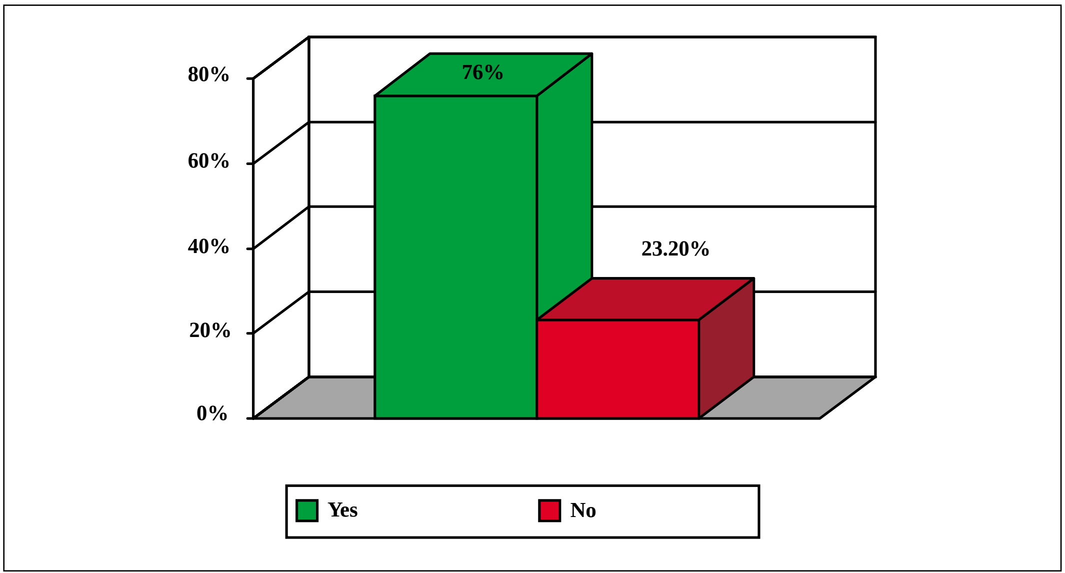
a) International travellers



b) Domestic travellers

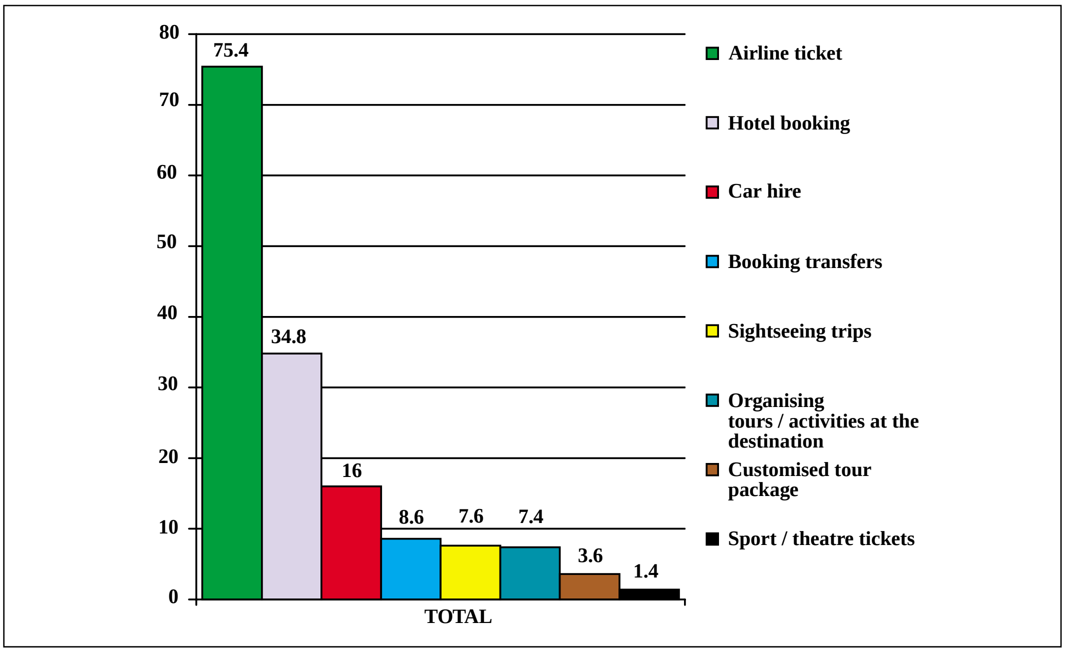


c) Travel agent use

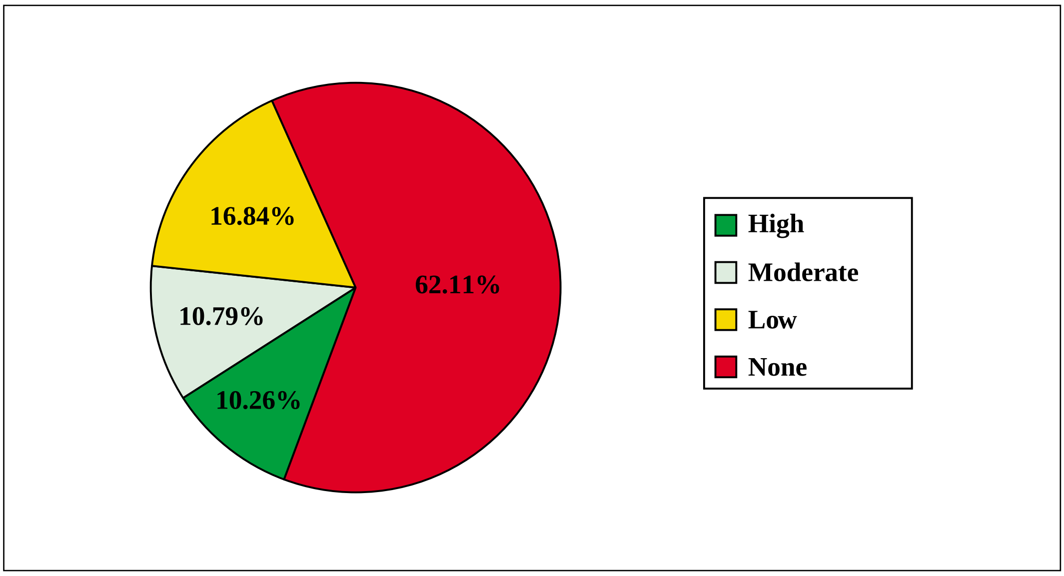


6.5K to 12.4K used Travel Agents more than other income groups (83.2%)
3K to 6.4K used Travel Agents the least of all income groups (63%)
50+ age group lowest usage of age categories (71.7%)

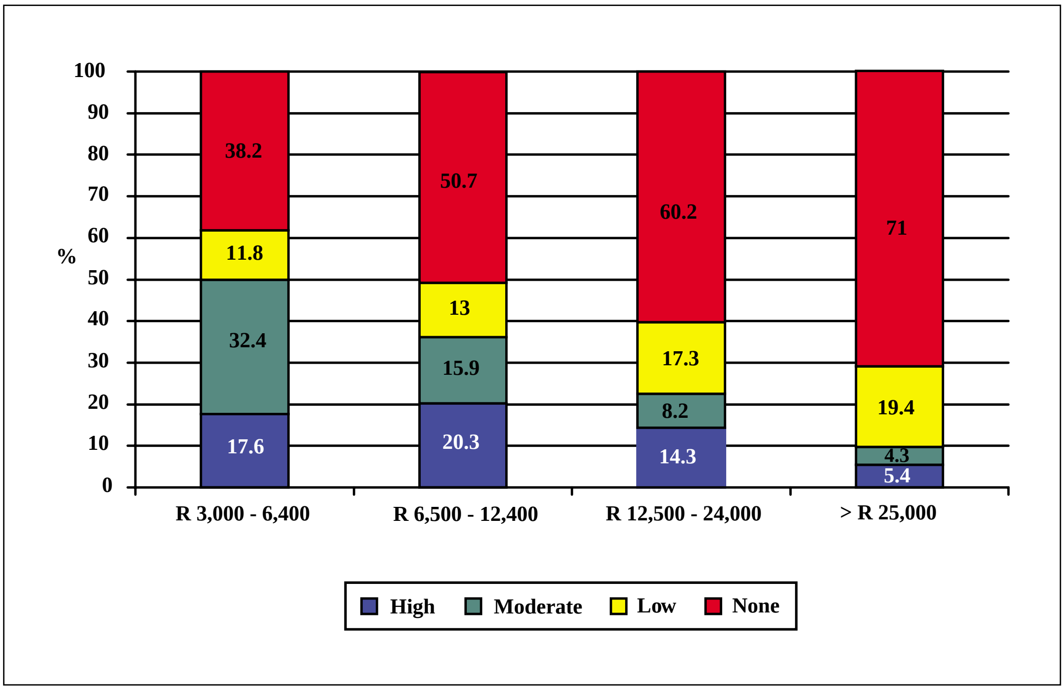
d) Usage of travel agent services



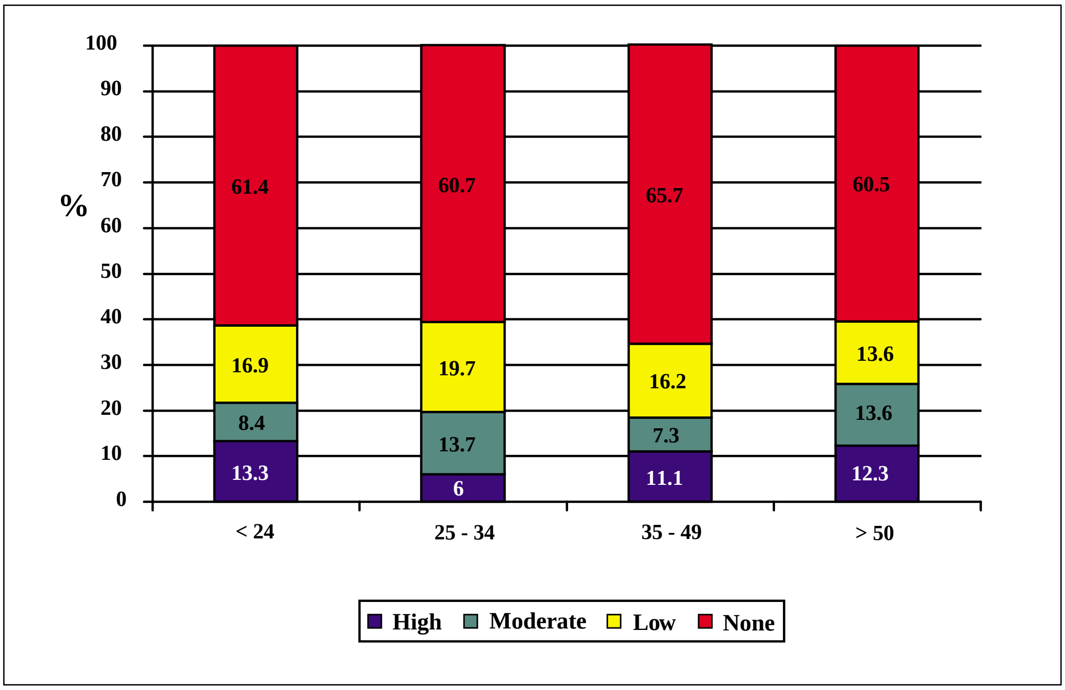
e) Travel agent influence in choice of destination



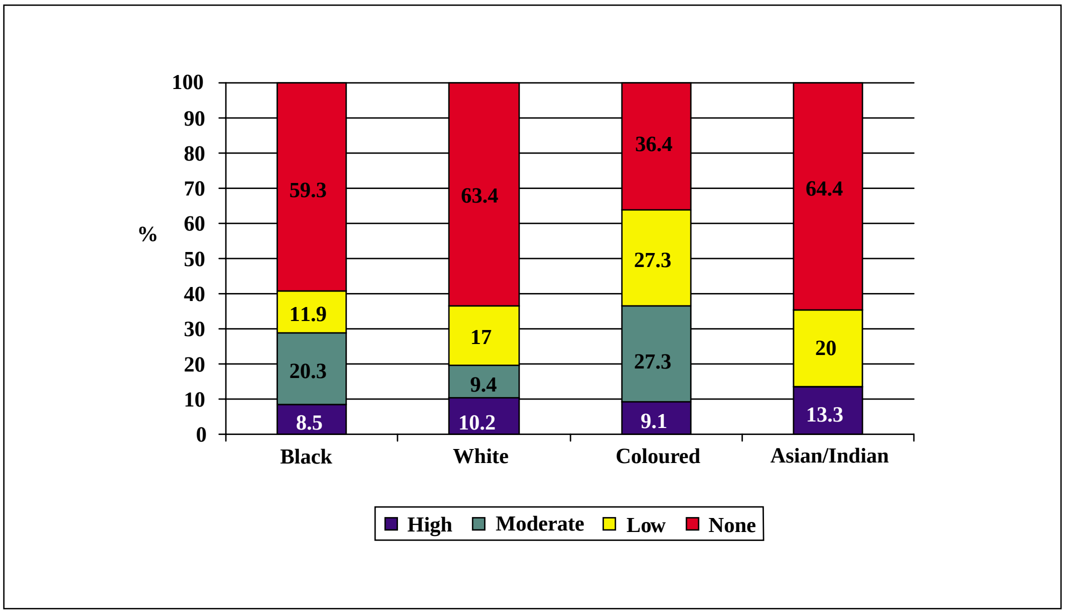
f) Travel agent influence in choice of destination (by income)



g) Travel agent influence in choice of destination (by age)



h) Travel agent influence in choice of destination (by race)



Countries Visited

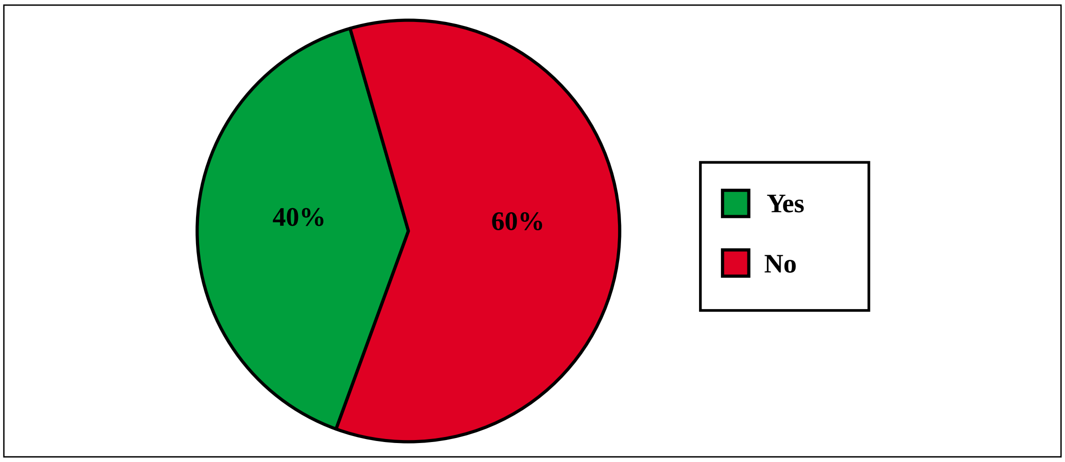
a) This trip

Algeria	Denmark	Kenya	Spain
Angola	Egypt	Korea	Swaziland
Argentina	Finland	Malawi	Switzerland
Australia	France	Malaysia	Taiwan
Austria	Germany	Mocambique	Tanzania
Bali	Greece	Morocco	Thailand
Bangkok	Holland	Namibia	Turkey
Belgium	Hong Kong	New Zealand	UAE
Botswana	India	Nigeria	USA
Britain	Indonesia	Poland	Zaire
Cameroon	Ireland	Portugal	Zambia
Canada	Israel	Saudi Arabia	Zimbabwe
China	Italy	Seychelles	
Cyprus	Japan	Singapore	

b) Most visited countries

Britain	28.2%
Australia	12.8%
USA	9.2%
Holland	7.2%
Germany	6.2%
Zimbabwe	5.2%
France	4.2%
Hong Kong	4.2%
UAE	3.5%
Belgium	3.0%

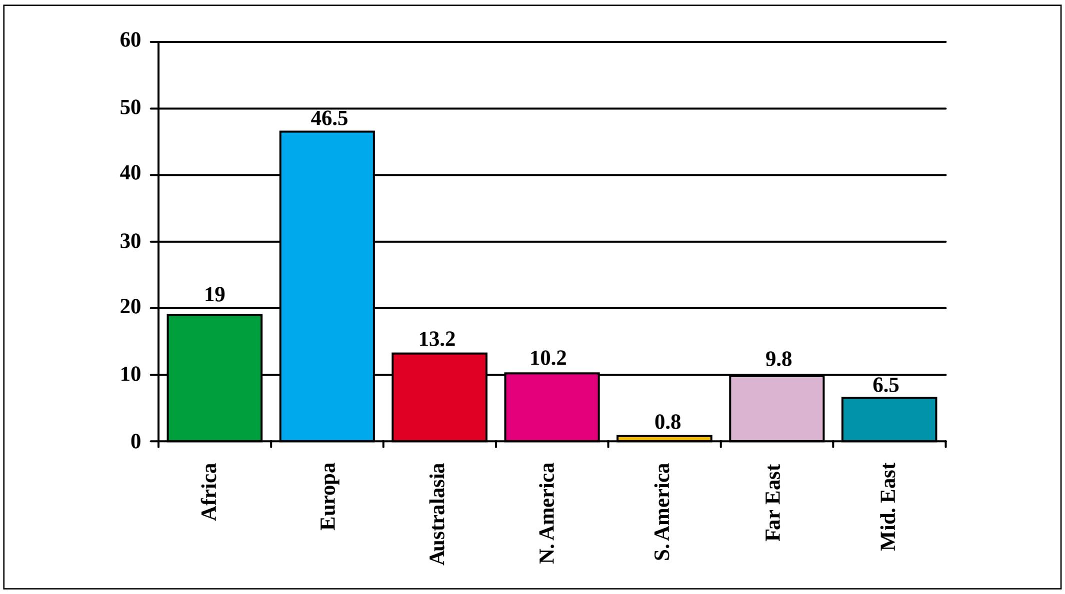
c) Multiple vists to same country



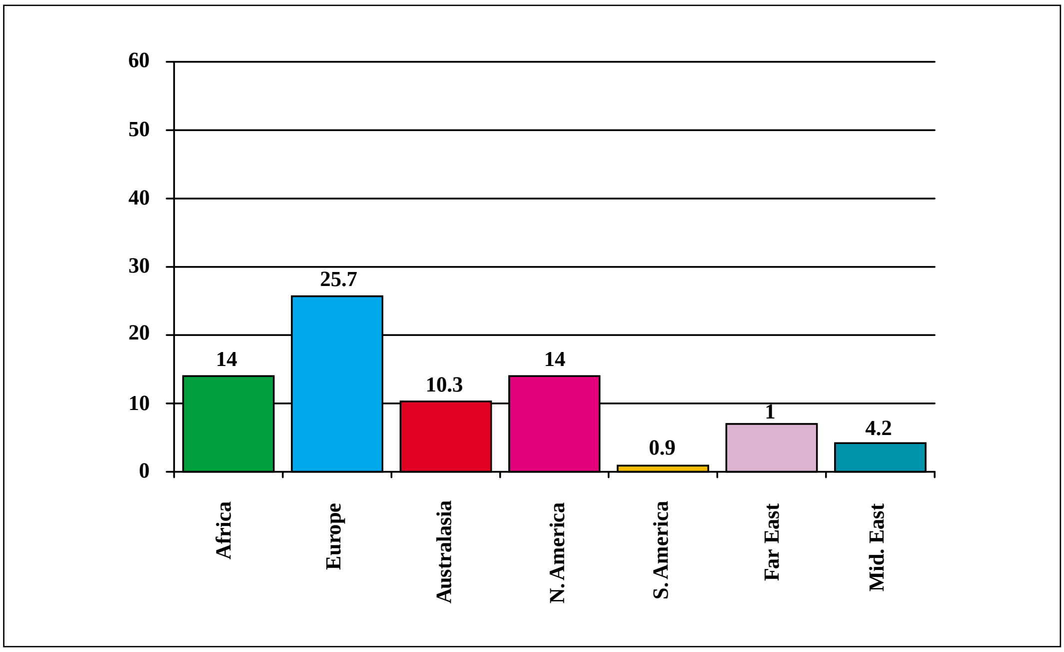
Repeat Visit Destinations

1	UK	38.8%
2	Australia	13.1%
3	USA	6.2%
4	Hong Kong	5.6%
5	France	5.0%

d) Leisure destinations (this trip)

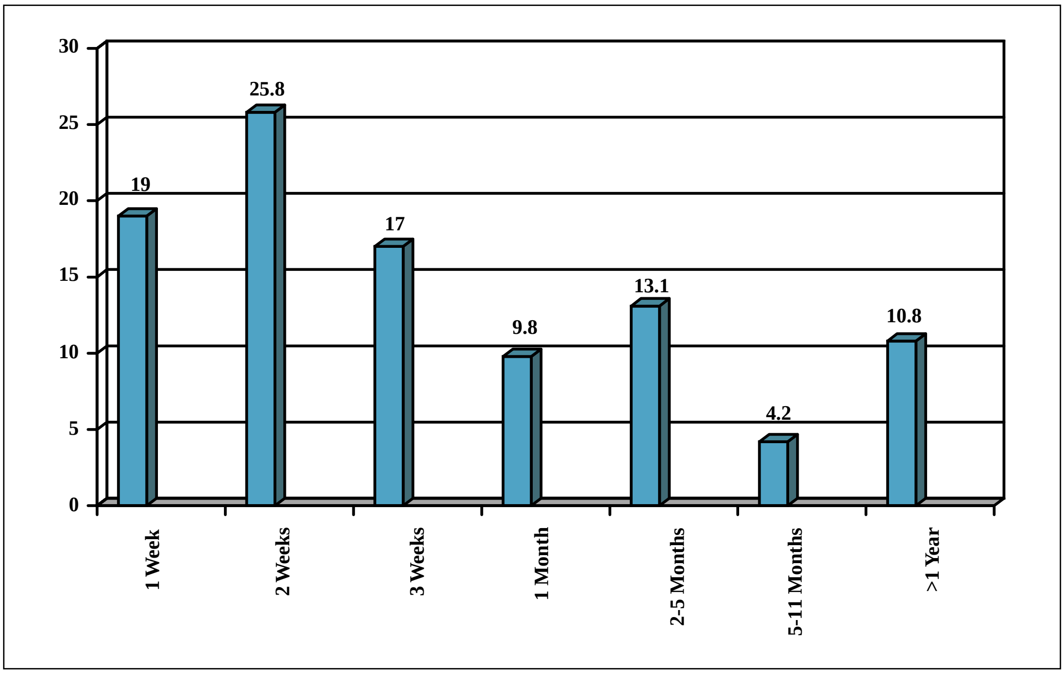


e) Leisure destinations (last 3 years)

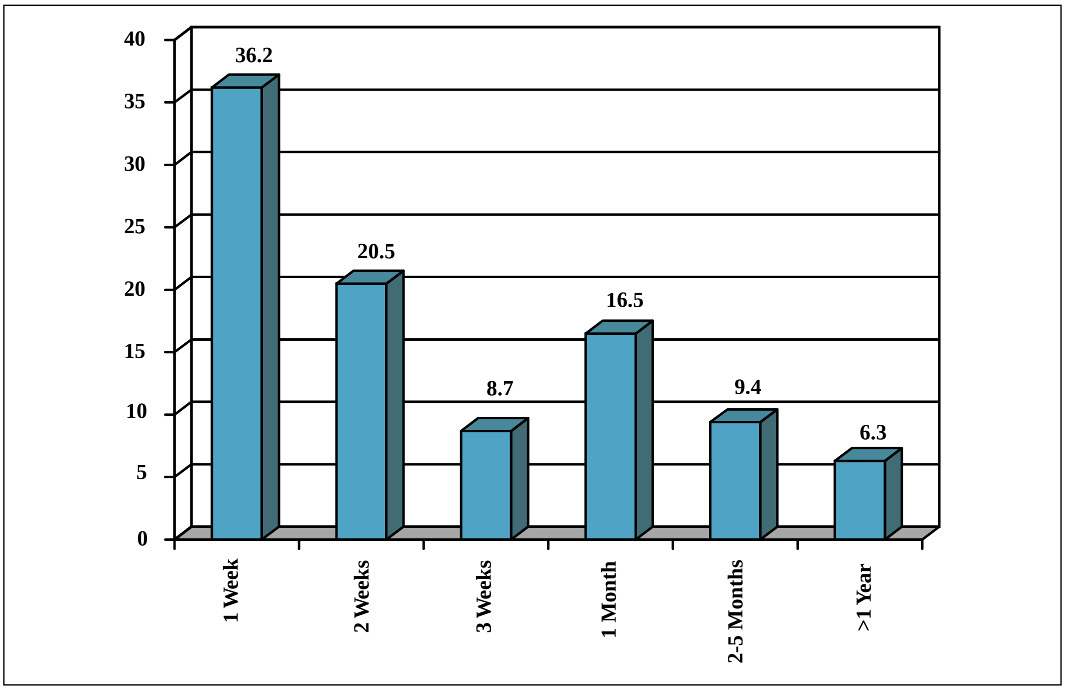


Duration of Stay

a) Single Destination

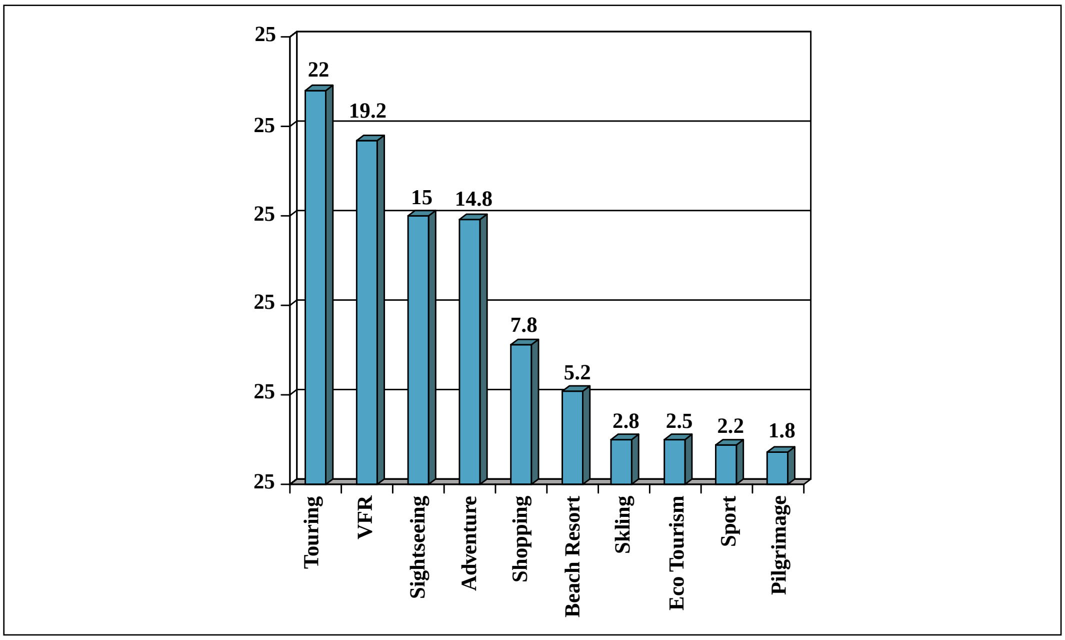


b) Multiple Destinations



Holiday Types Experienced

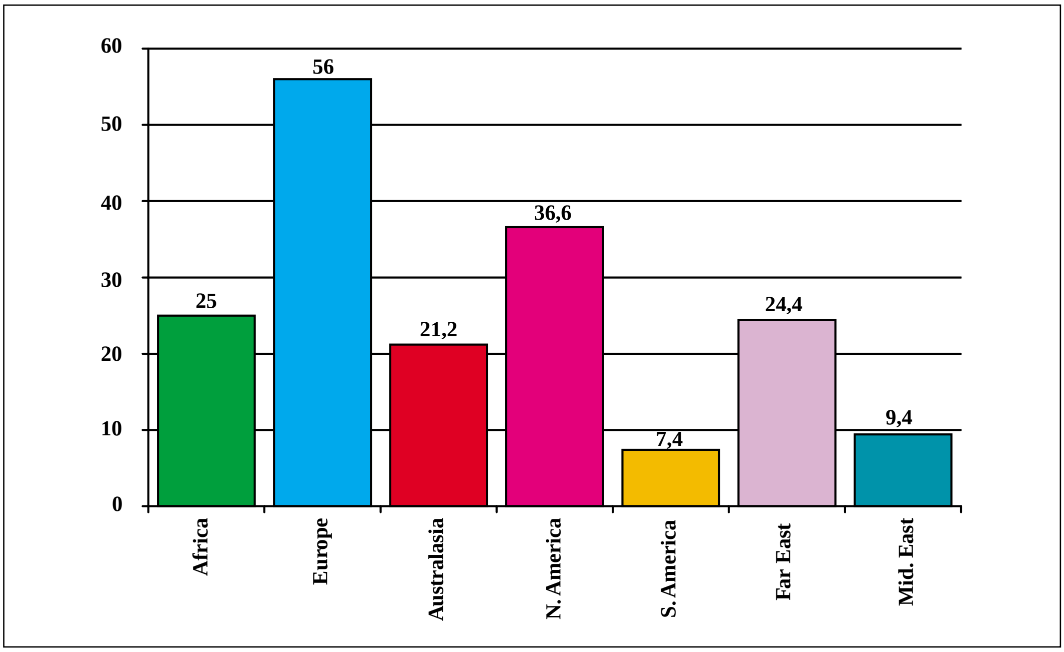
a) Last 3 Years



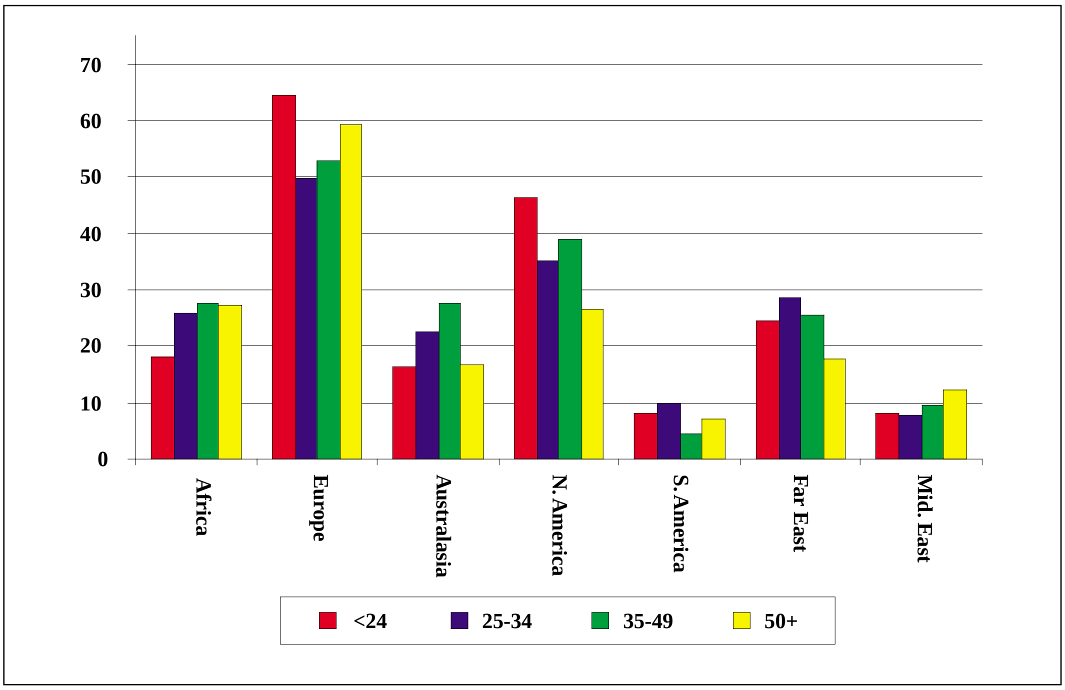
b) Top 5 motivations for travelling outside South Africa on holiday

- VFR (110 mentions)
- To gain experience and broaden knowledge of the world (60 mentions)
- To see the world (57 mentions)
- To get away from crime / go to safe places (32 mentions)
- Relaxation (29 mentions)

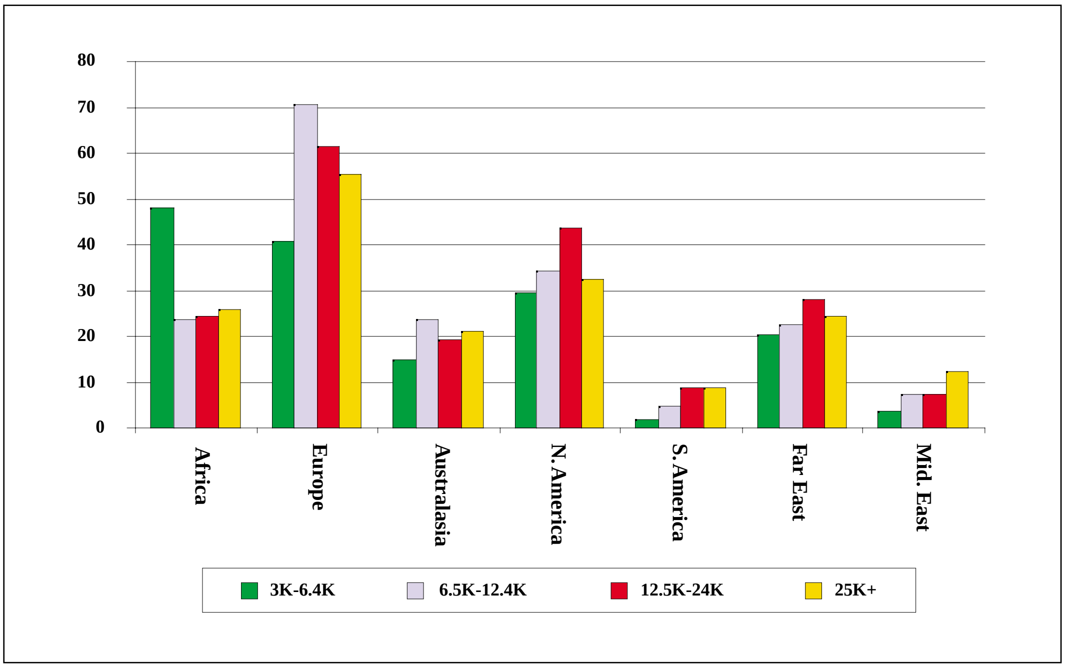
c) Future leisure destinations (by region)



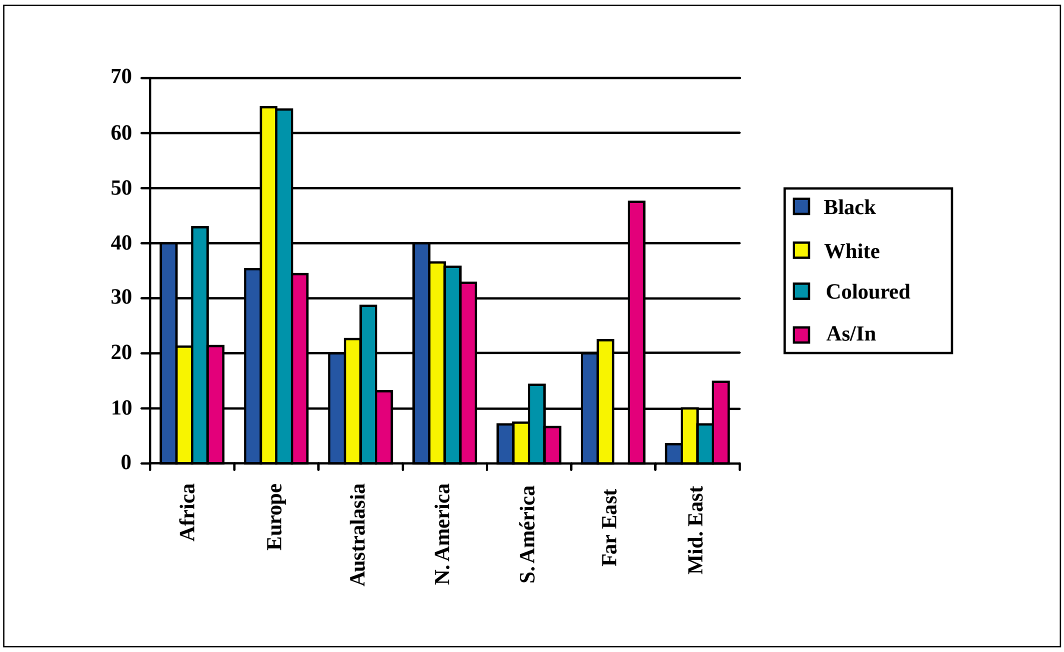
d) Future leisure destinations (regions by age)



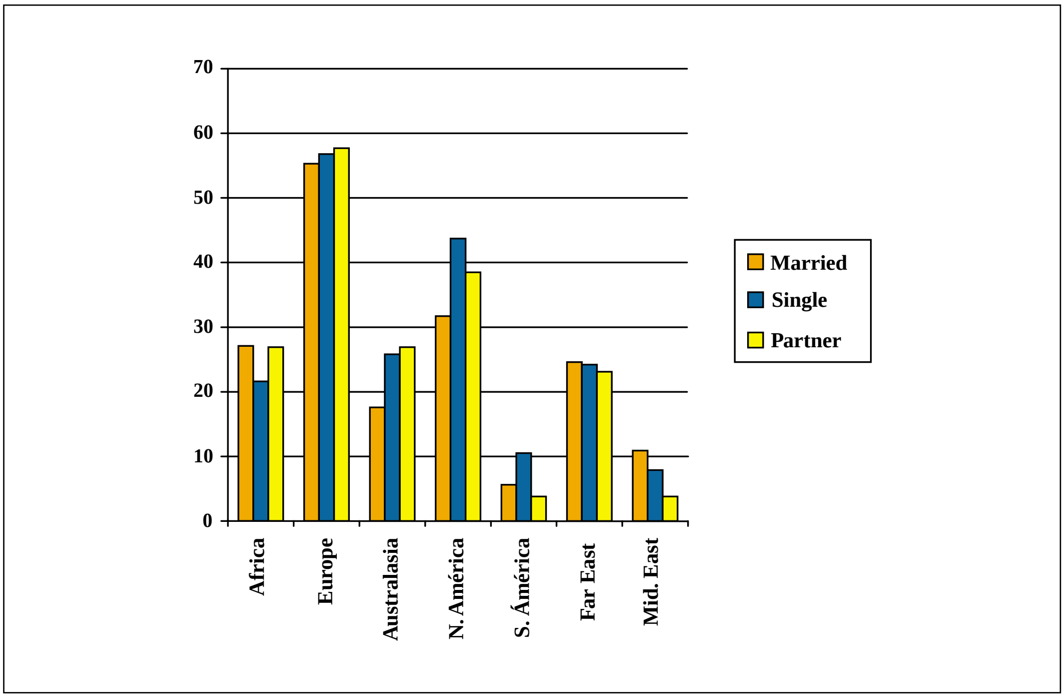
e) Future leisure destinations (regions by income)



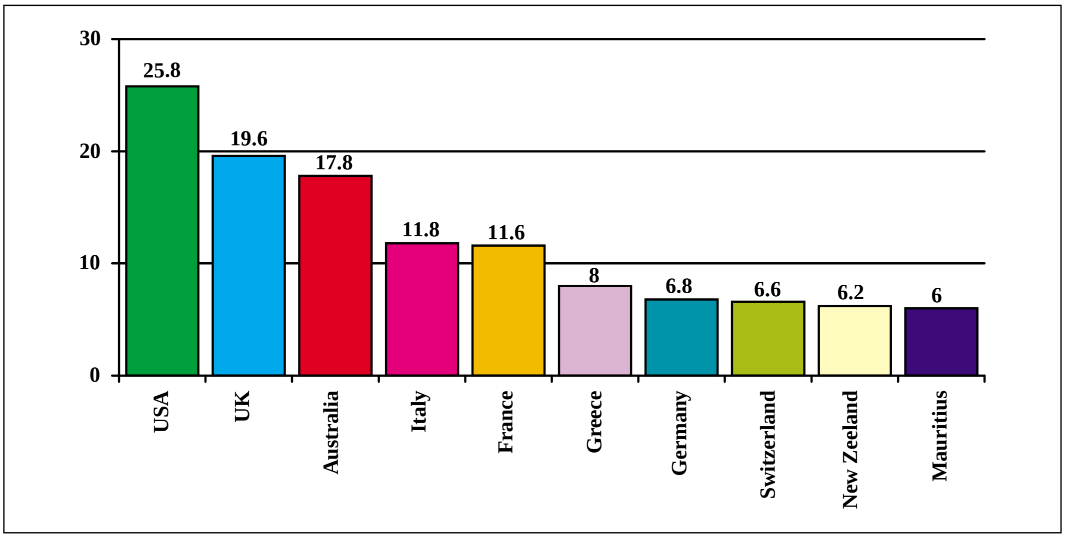
f) Future leisure destinations (regions by race)



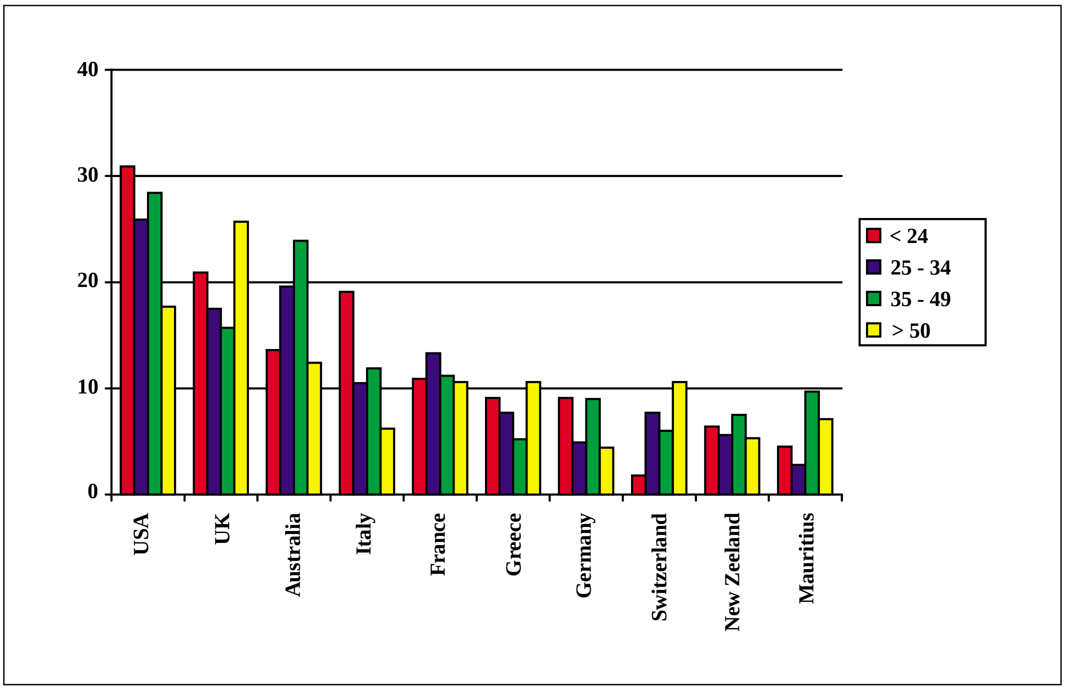
g)Future leisure destinations (regions by marital status)



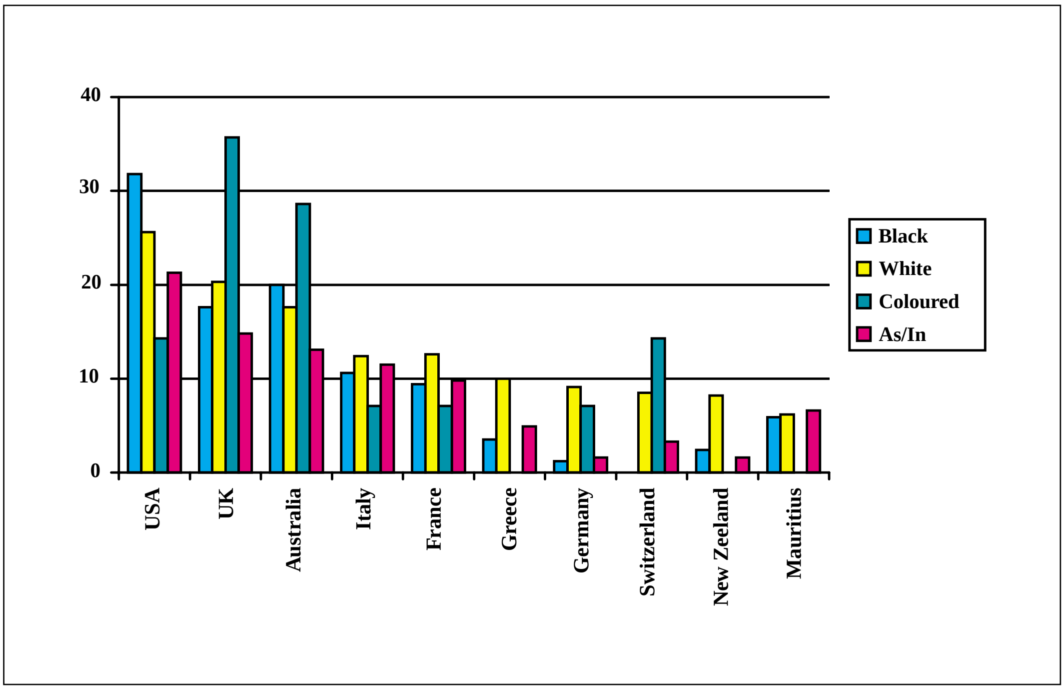
h) Future leisure destinations



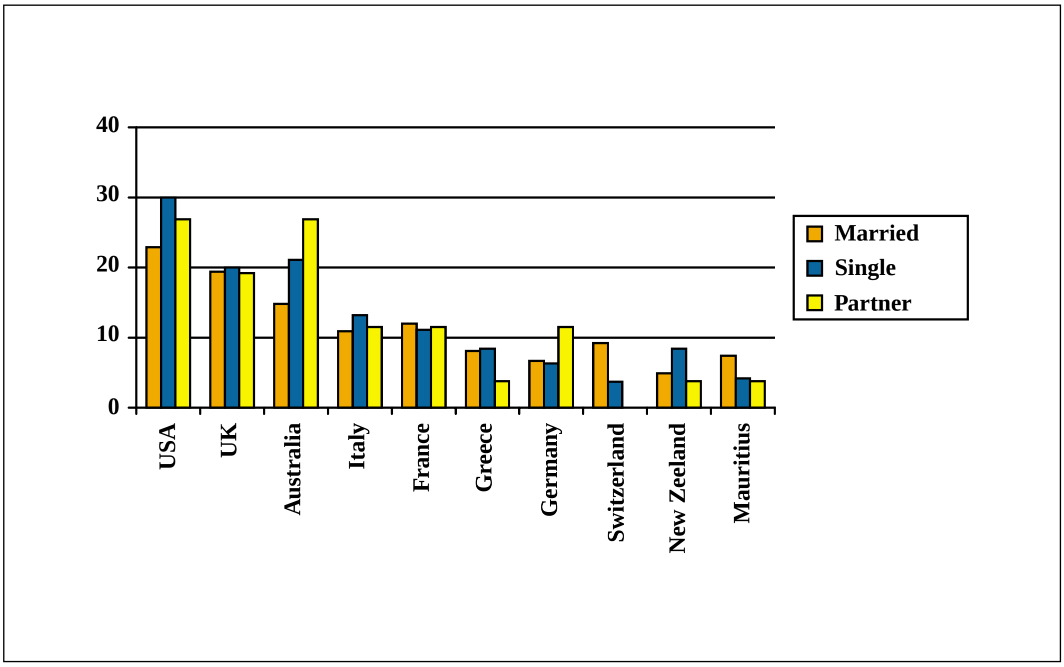
i) Future leisure destinations (by age)



j) Future leisure destinations (by race)

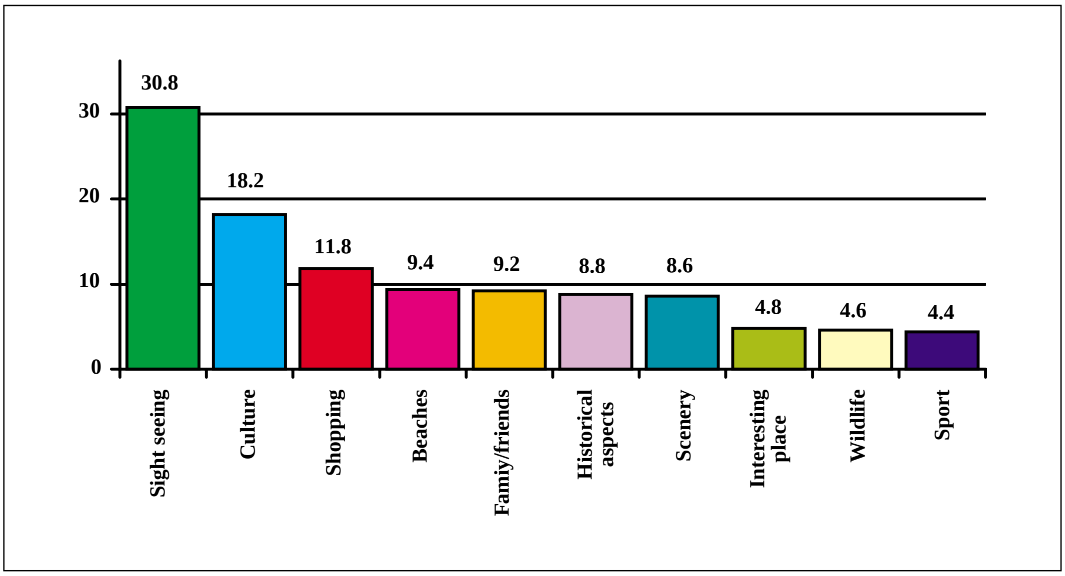


k) Future leisure destinations (by marital status)

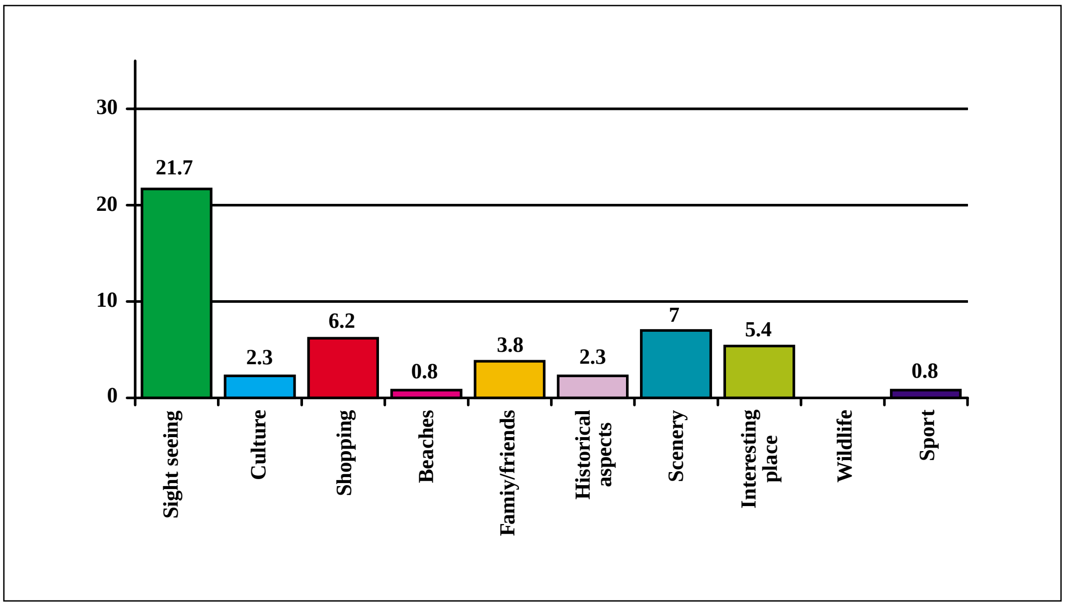


Main Attractions

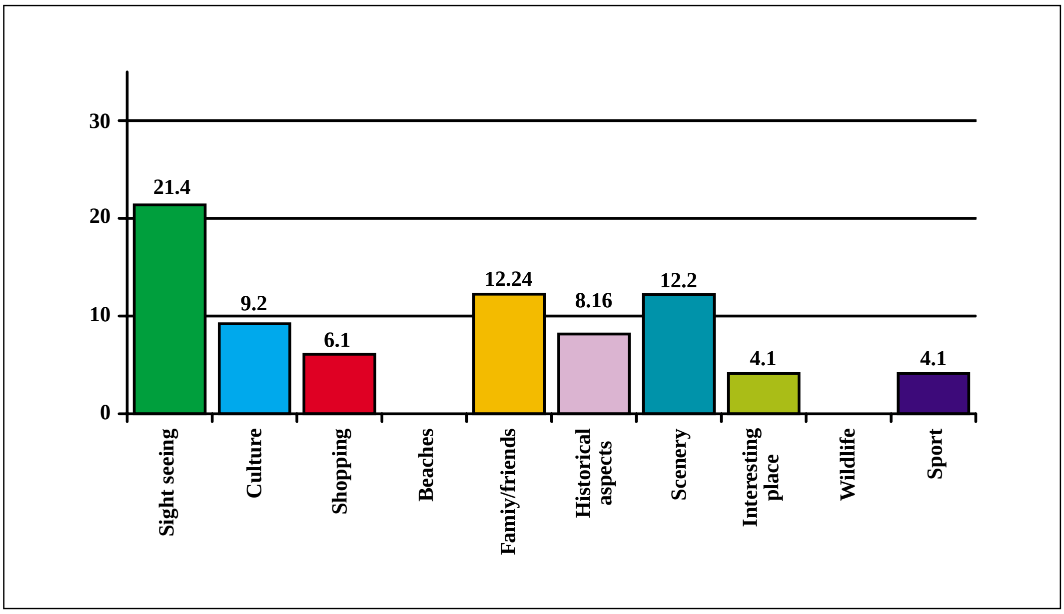
a) Overall



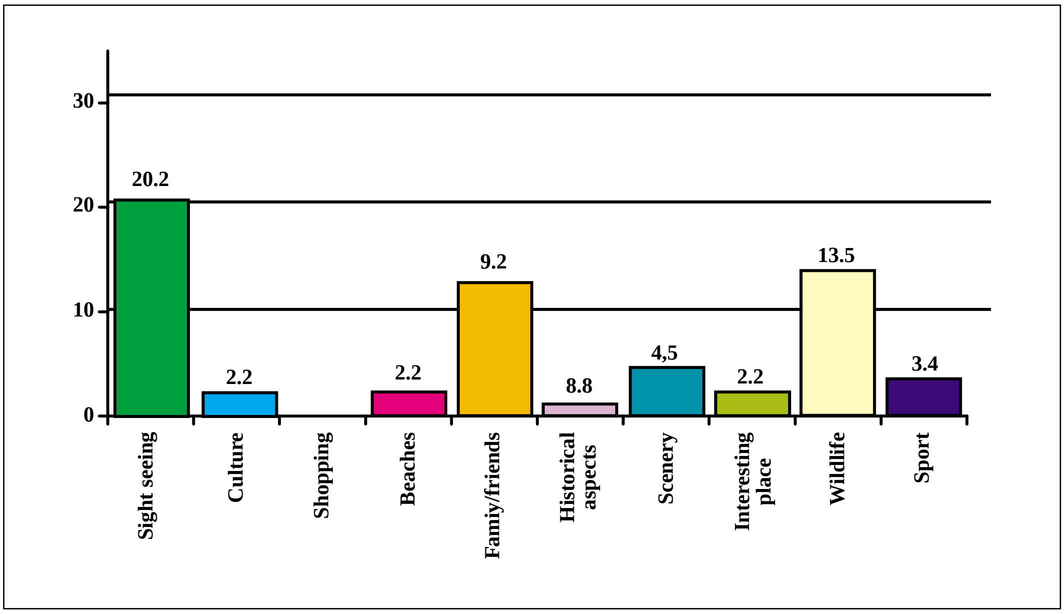
b) USA



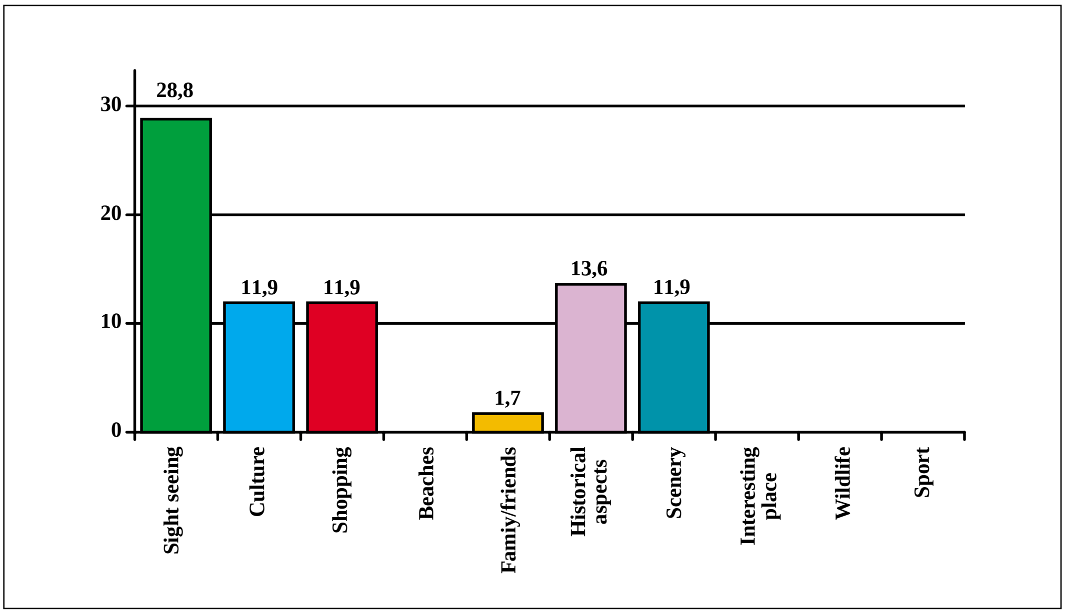
c) United Kingdom



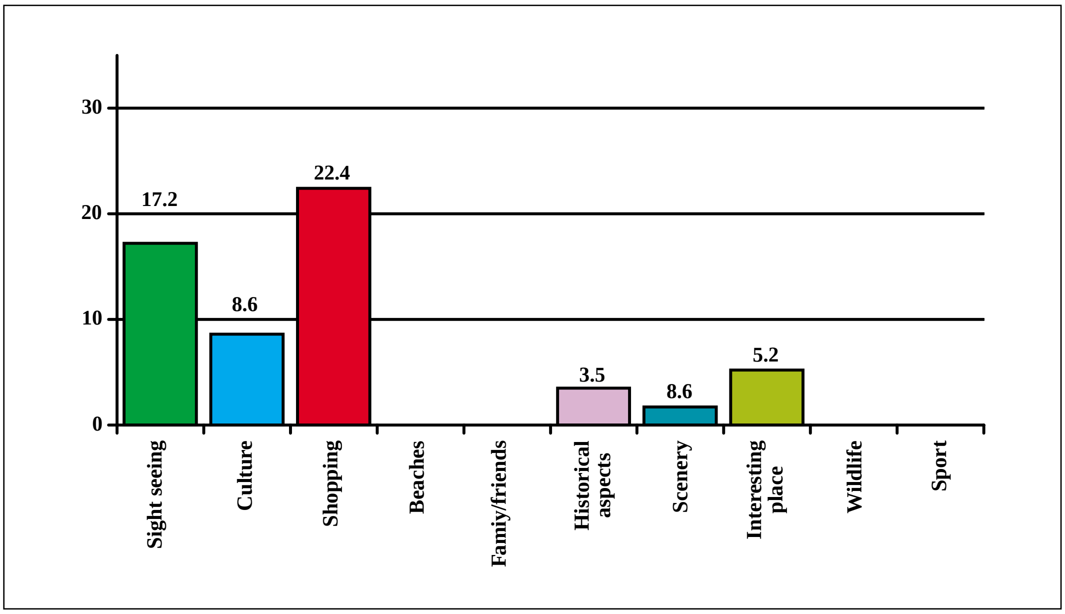
d) Australia



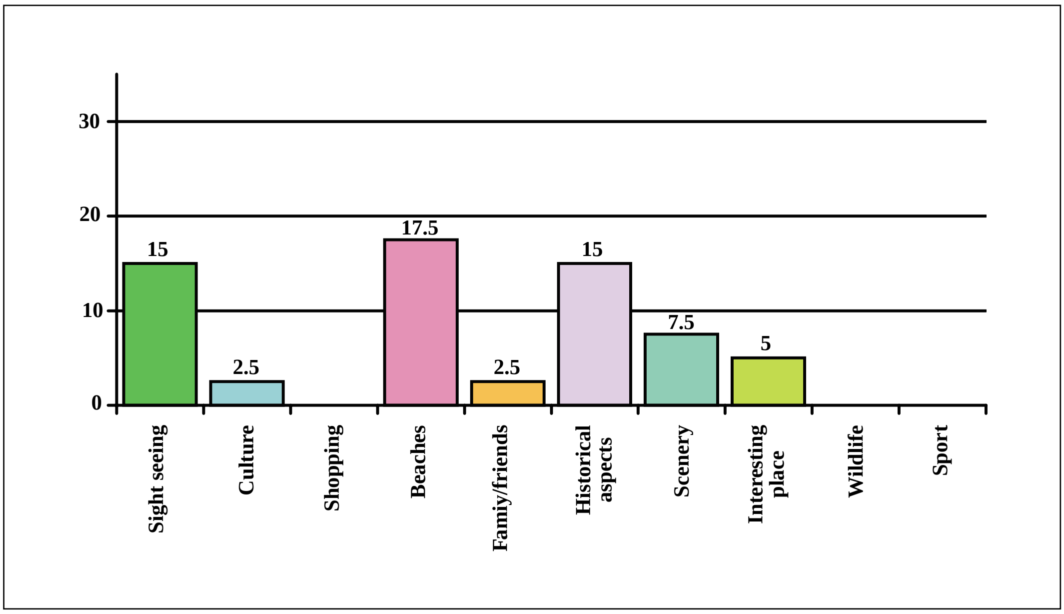
e) Italy



f) France

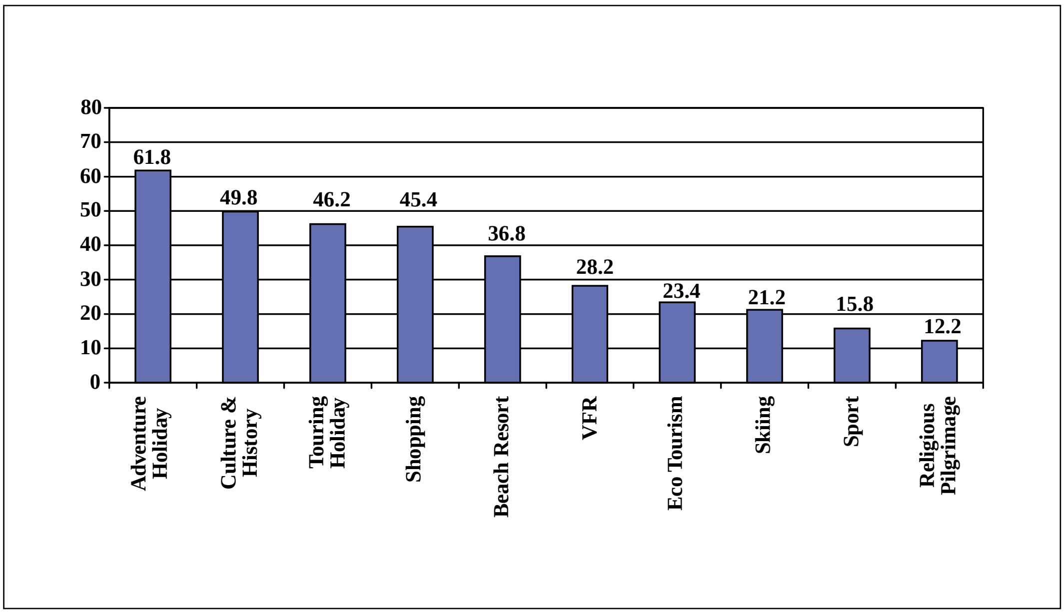


g) Greece

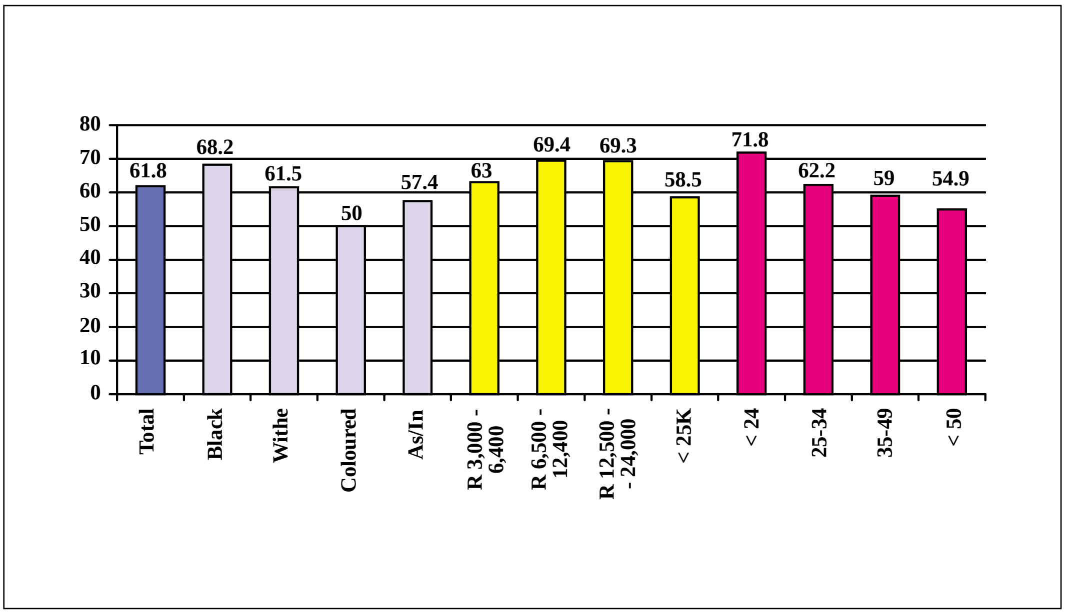


Future Holiday Types

a) Holiday Types Ranked by Level of Interest

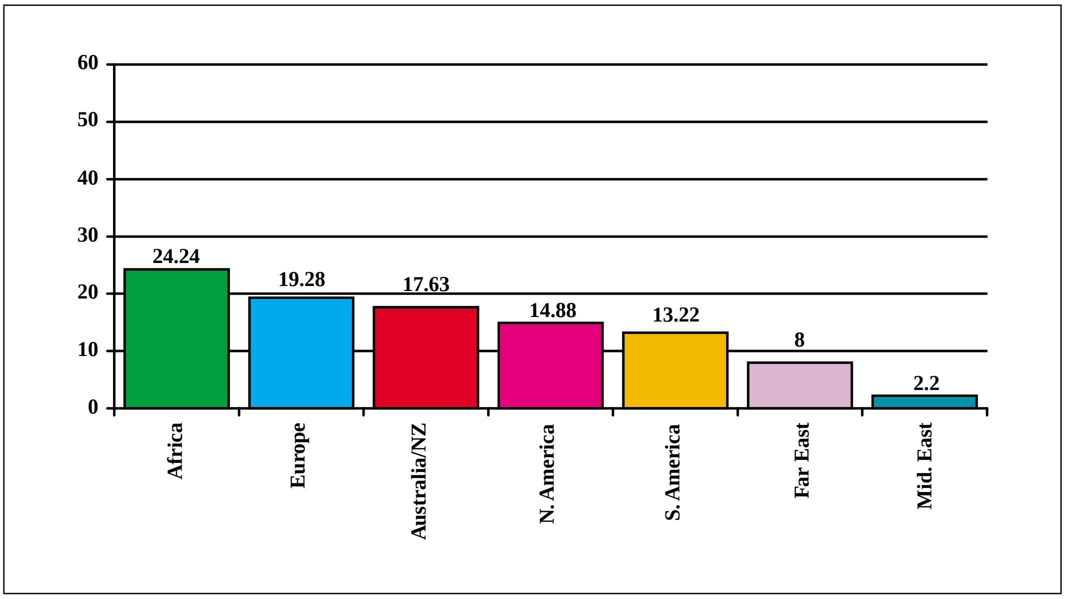


b) Desire to experience adventure holidays

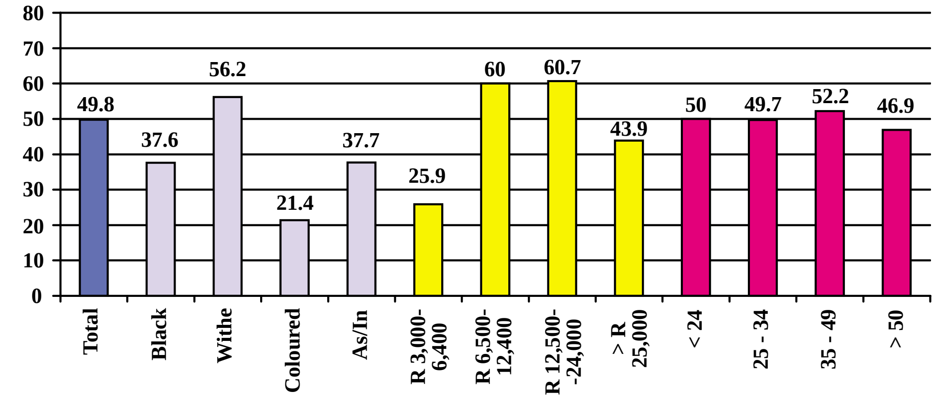


12.5K-24K significantly higher than 25K+
<24 rate significantly higher than 35-49 & 50+ ages (90% confidence)

c) Adventure holiday (by region)

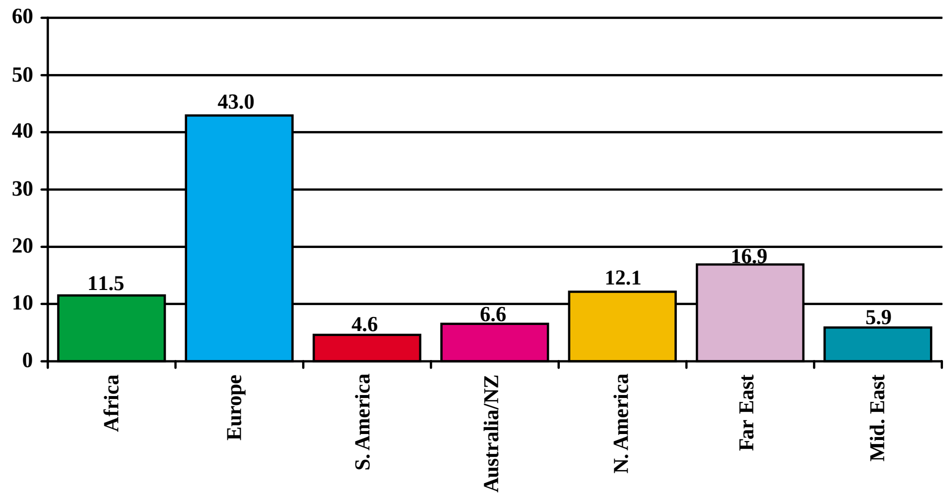


d) Desire to experience Culture & History (by region)

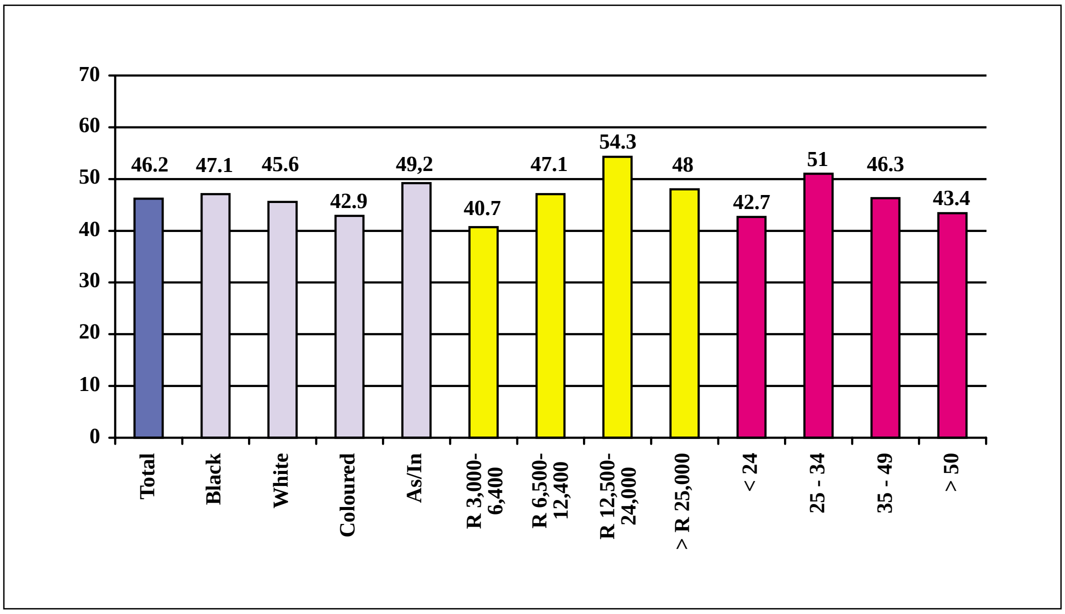


Whites exhibit higher levels of desire than other Race Groups.
3K-6.4K rate significantly lower than all other Income groups.
The 2 middle Income groups rate significantly higher than the 25K+ (90% confidence).

e) Culture & History (by region)

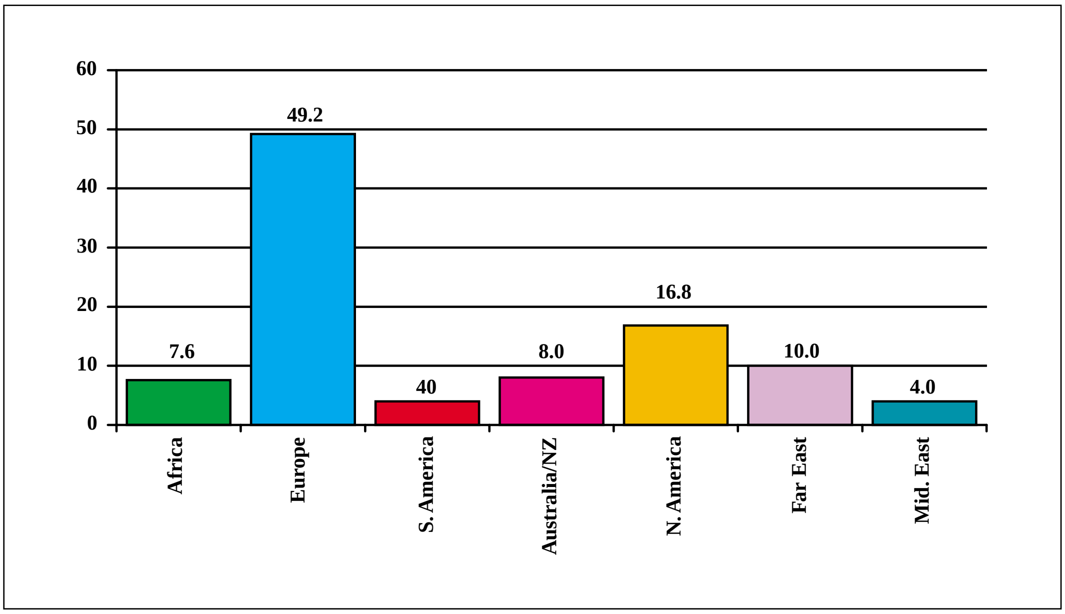


f) Desire to experience touring holidays

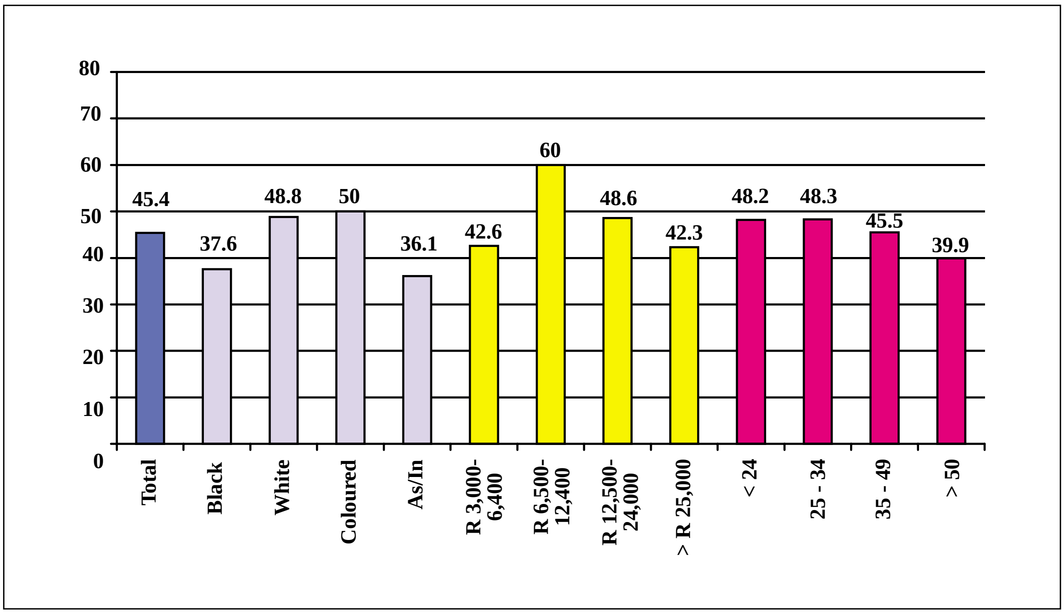


12.5K-24K rate significantly higher than 3K-6.4K (90% confidence)

g) Touring holidays (by region)

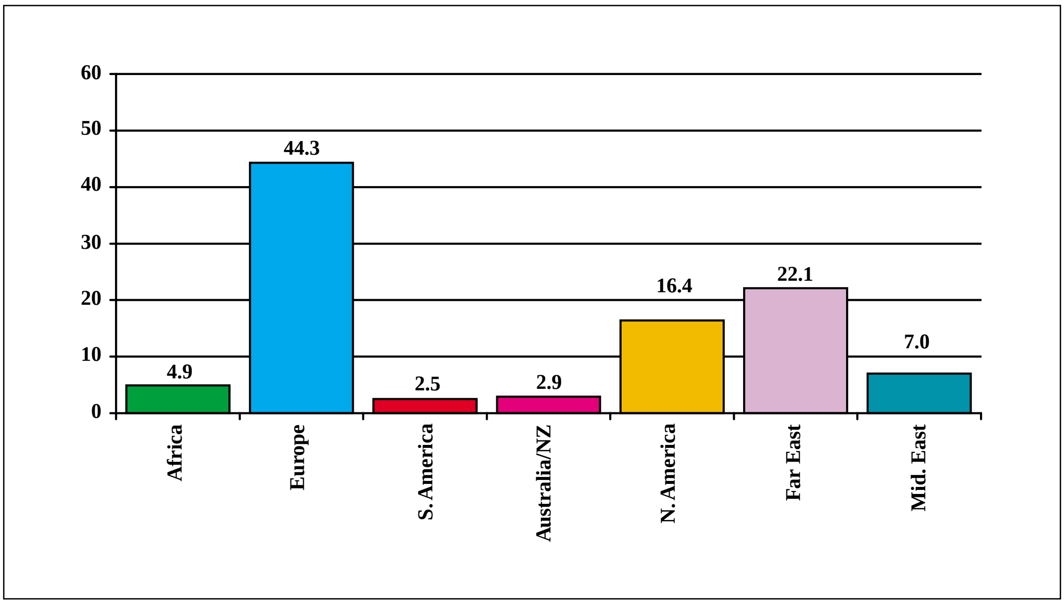


h) Desire to experience shopping holidays

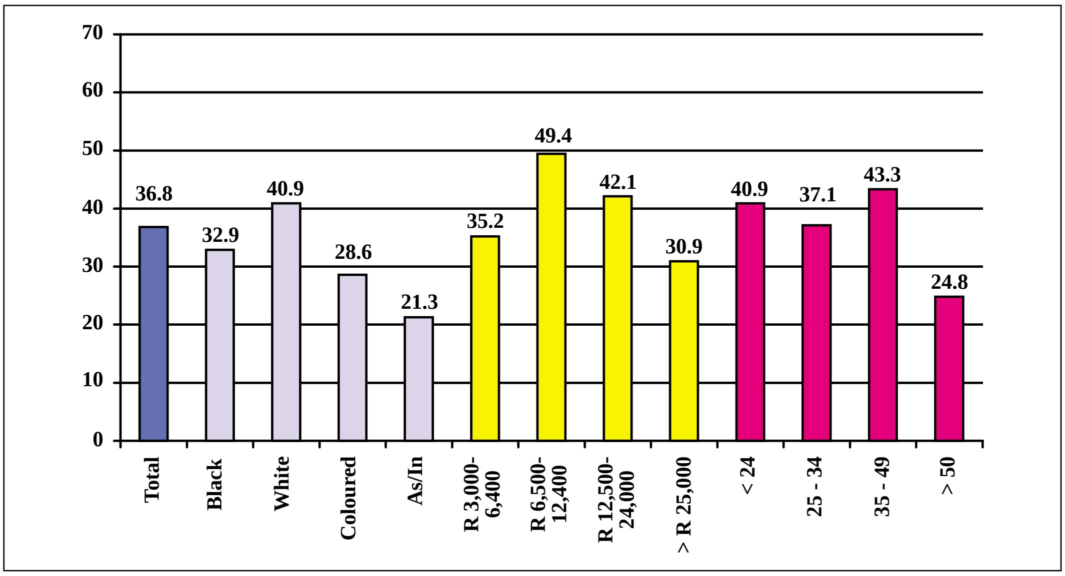


6.5K-12.4K rate significantly higher than all other Income groups (90% confidence)

i) Shopping holiday (by region)

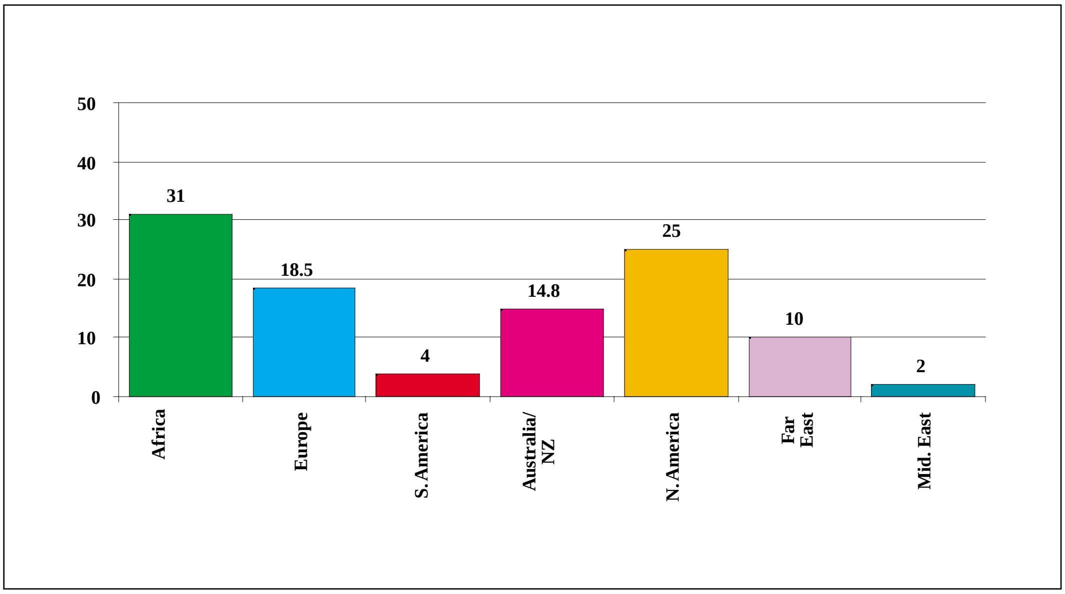


j) Desire to experience beach resort holidays

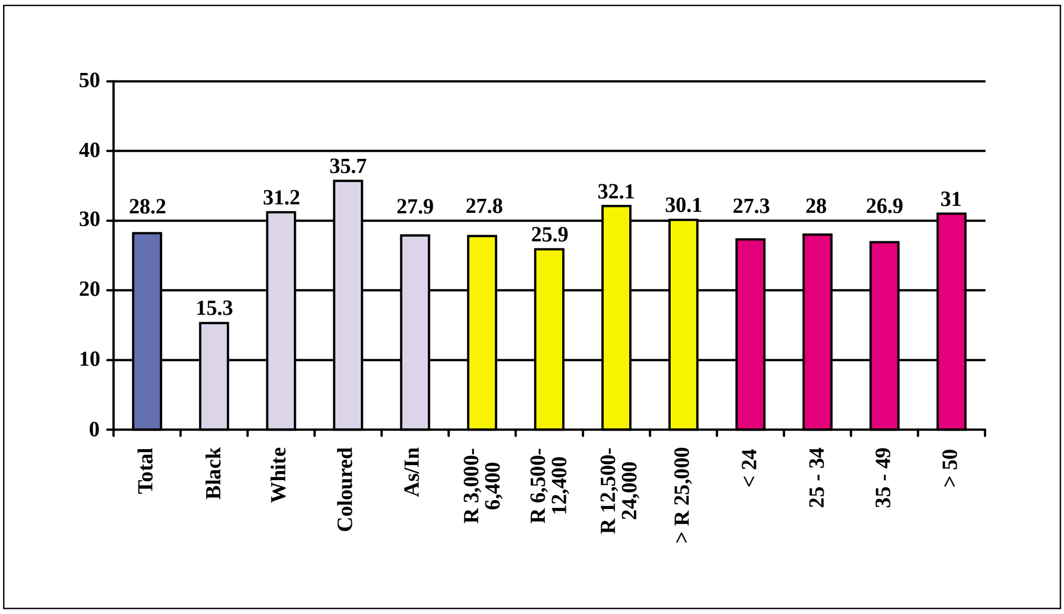


Whites rate significantly higher than As/In.
6.5K-12.4K rate significantly higher than upper and lower groups. 12.5K-24K rate higher than 25K+
All age groups rate higher than 50+ (90% confidence).

k) Beach resort (by region)

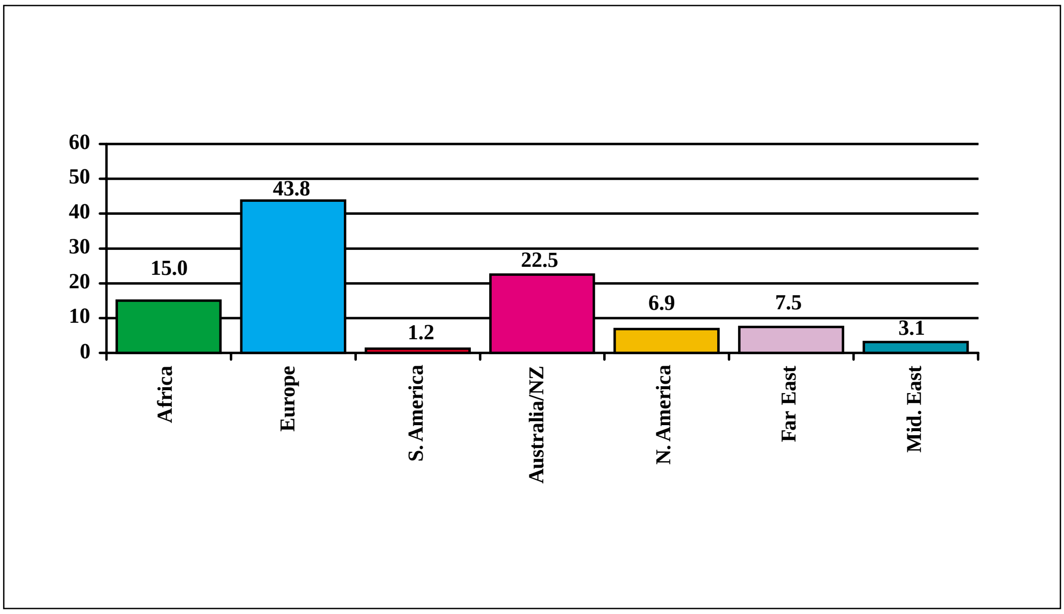


l) Desire to experience VFR holidays

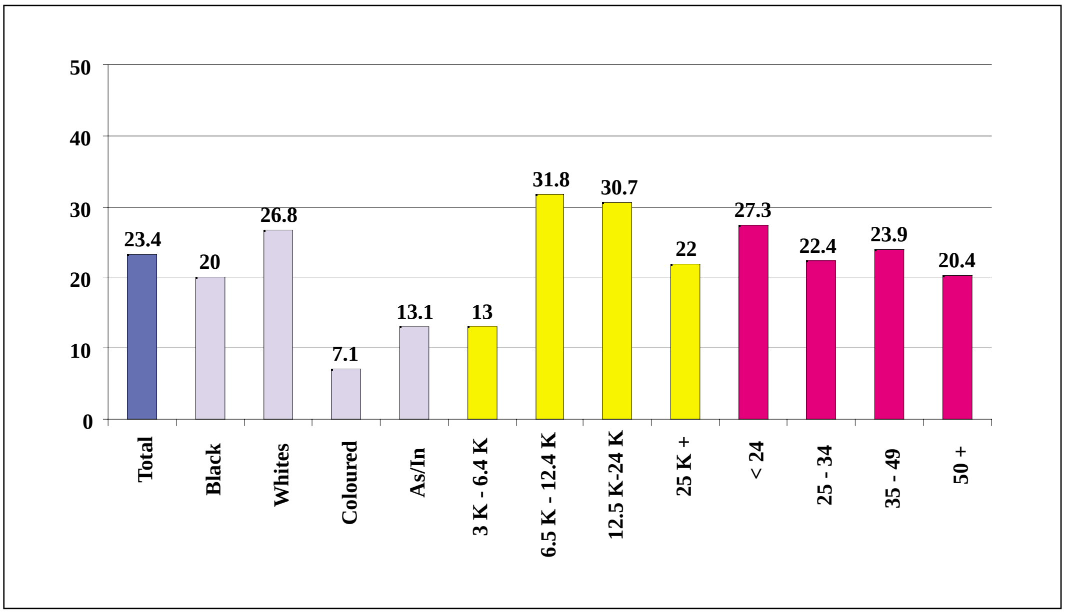


As/In and Whites rate significantly higher than Blacks (90% confidence)

m) VFR (by region)

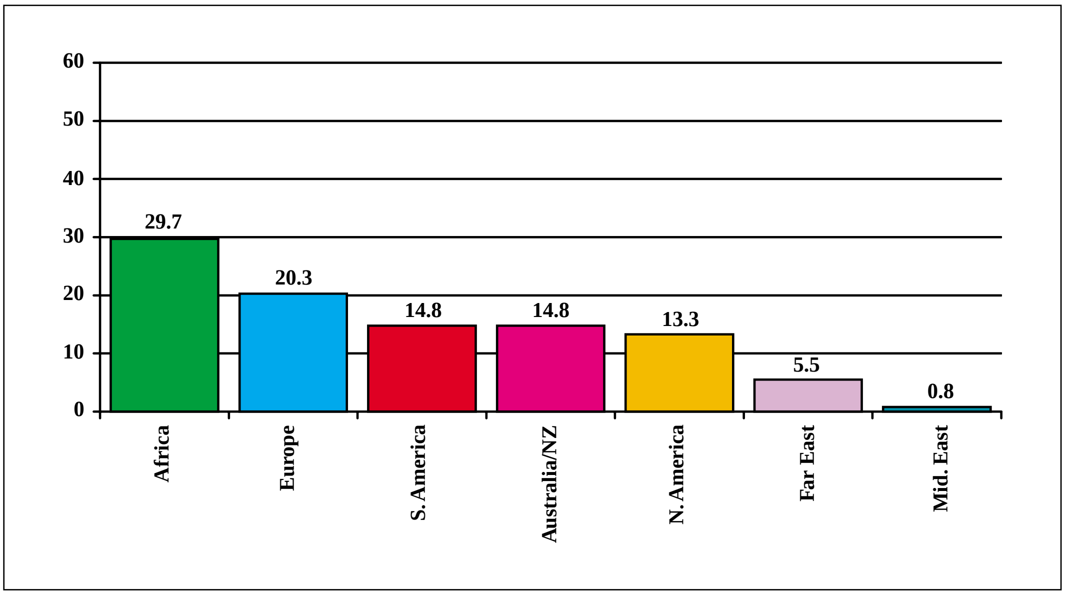


n) Desire to experience eco-tourism holidays

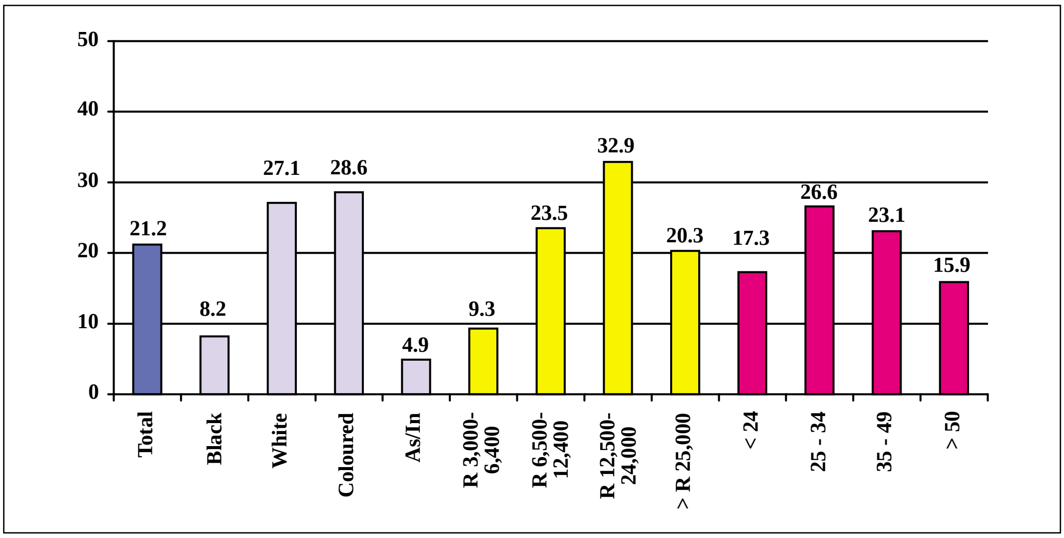


Whites rate significantly higher than Coloureds and As/In (90% confidence).
6.5K-12.4K & 12.5K-24K both rate significantly higher than 3K-6.4K.

o) Eco-tourism (by region)

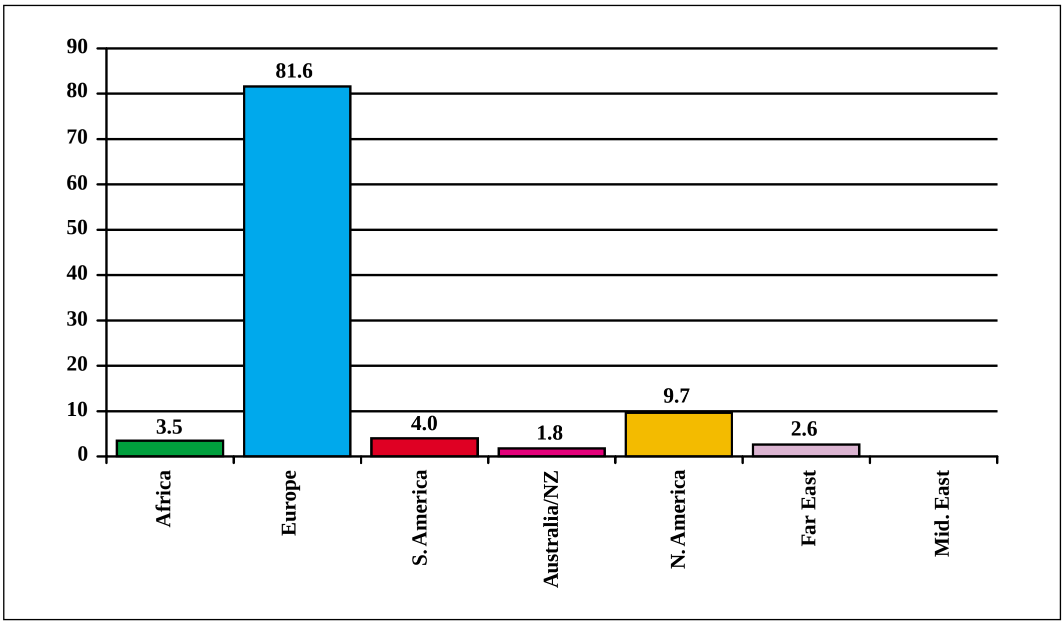


p) Desire to experience skiing holidays

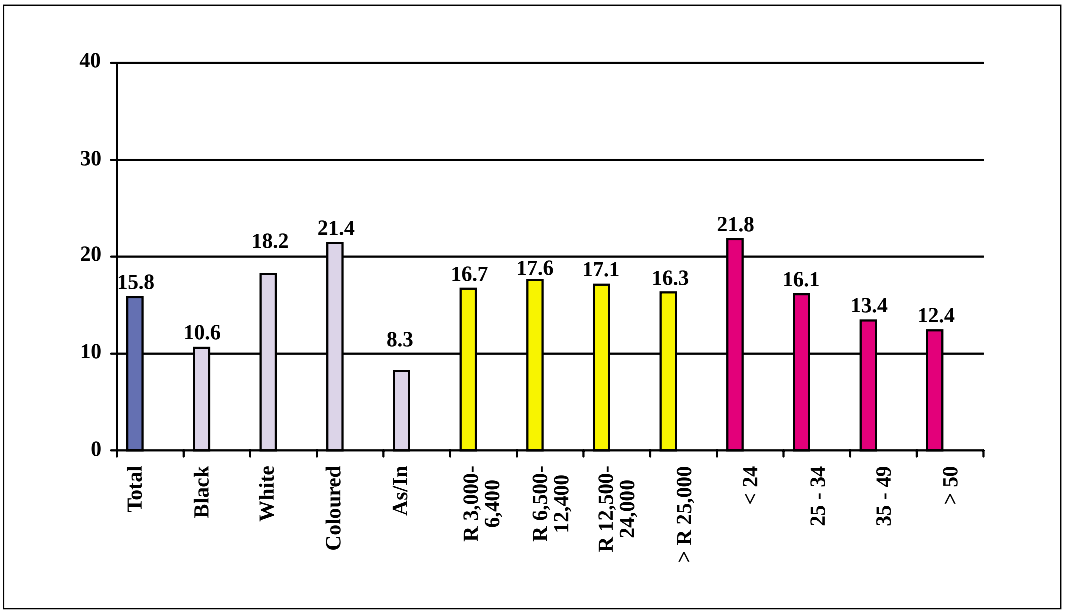


Whites rate significantly higher than Blacks and As/In. Coloureds rate significantly higher than As/In.
12.5K-24K rate higher than 25K+ All Income groups rate significantly higher than 3K-6.4K. 25-34 ages rate higher than <24 & 50+(90% confidence).

q) Skiing holidays (by region)

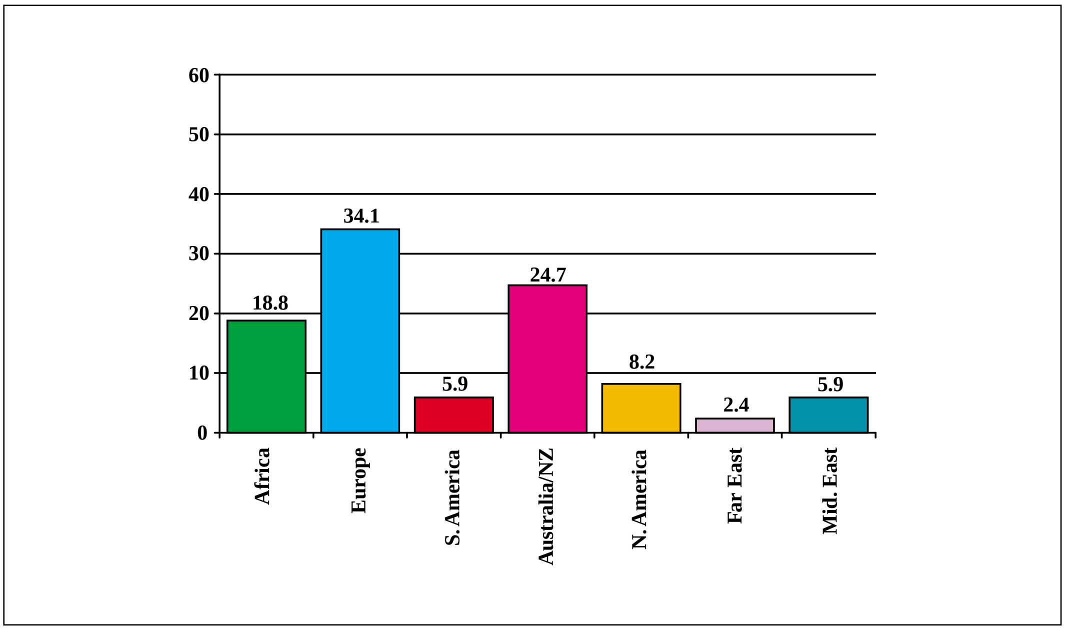


r) Desire to experience sports holidays

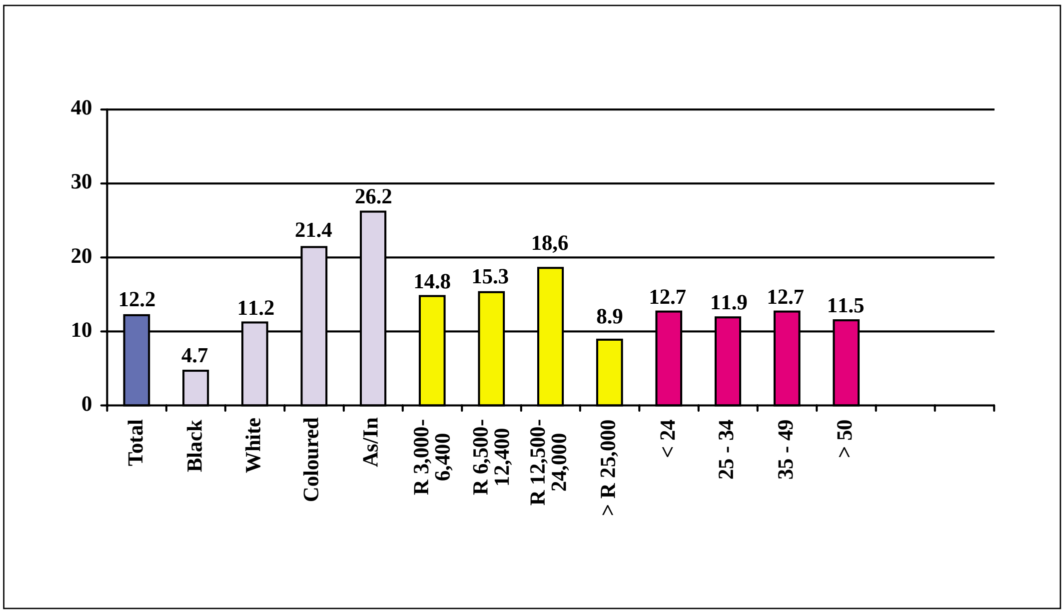


Whites rate significantly higher than Blacks and As/In.
<24 rate significantly higher than 35-49 & 50+ (90% confidence)

s) Sports holidays (by region)

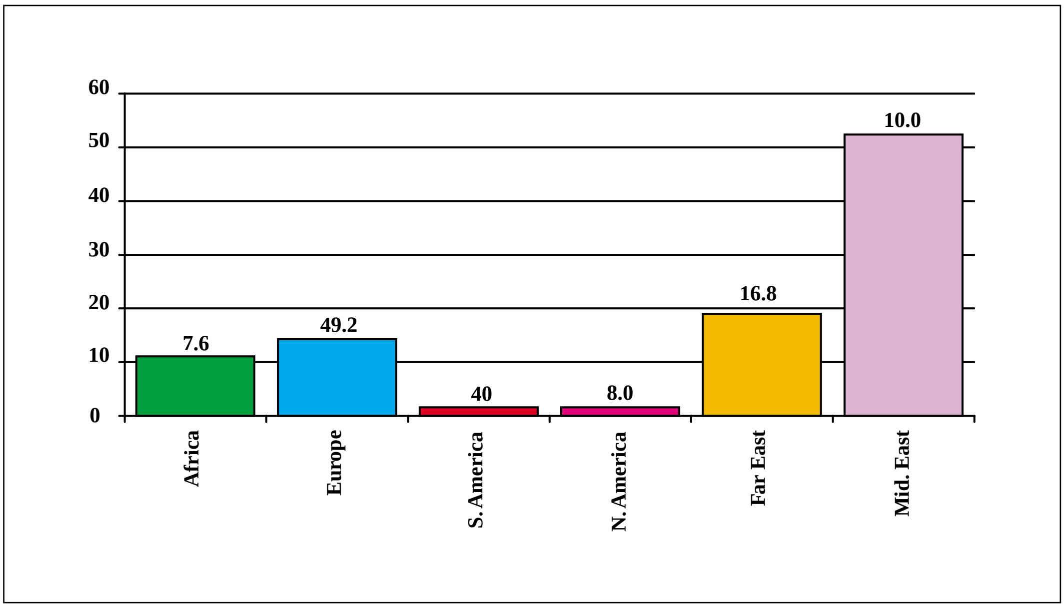


t) Desire to experience religious pilgrimages

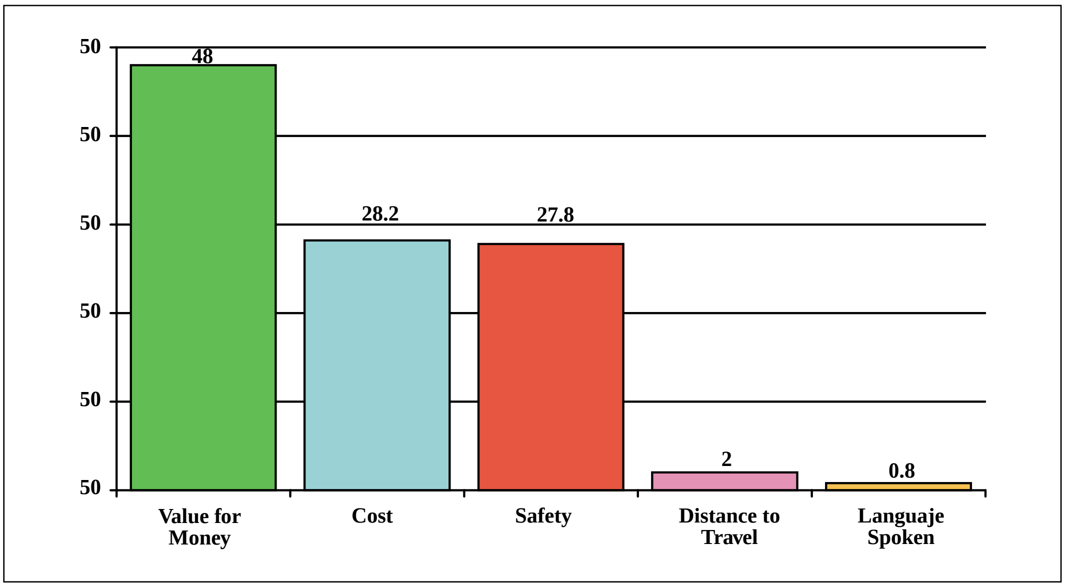


Whites rate significantly higher than Blacks. As/IN rate significantly higher than Whites and Blacks (90% confidence).

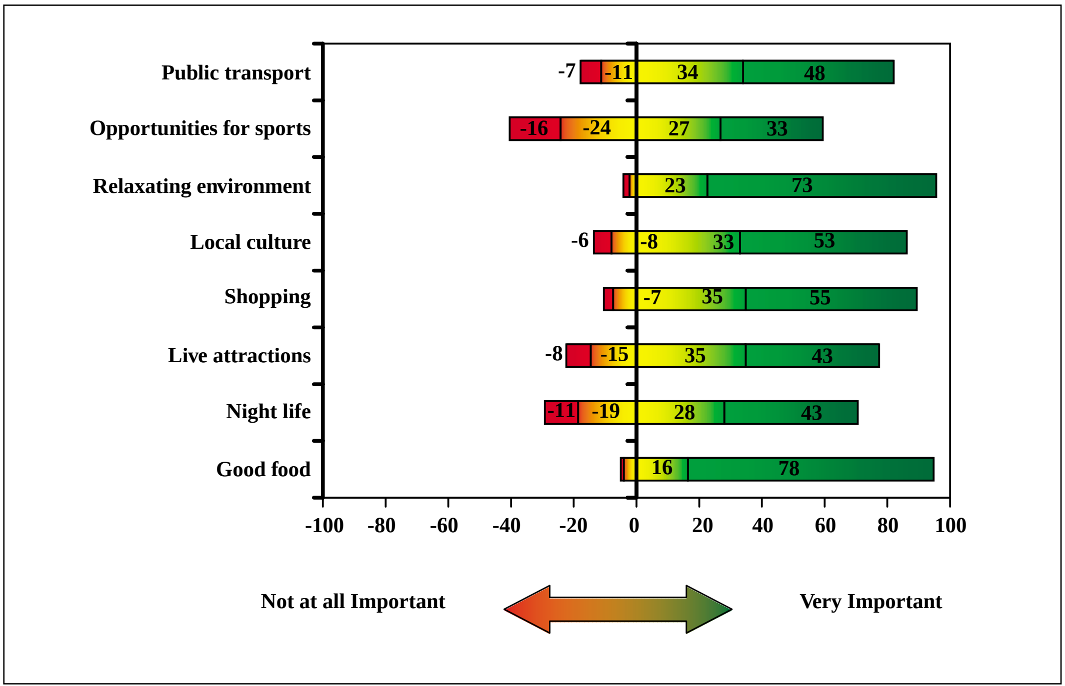
u) Religious pilgrimage (by region)



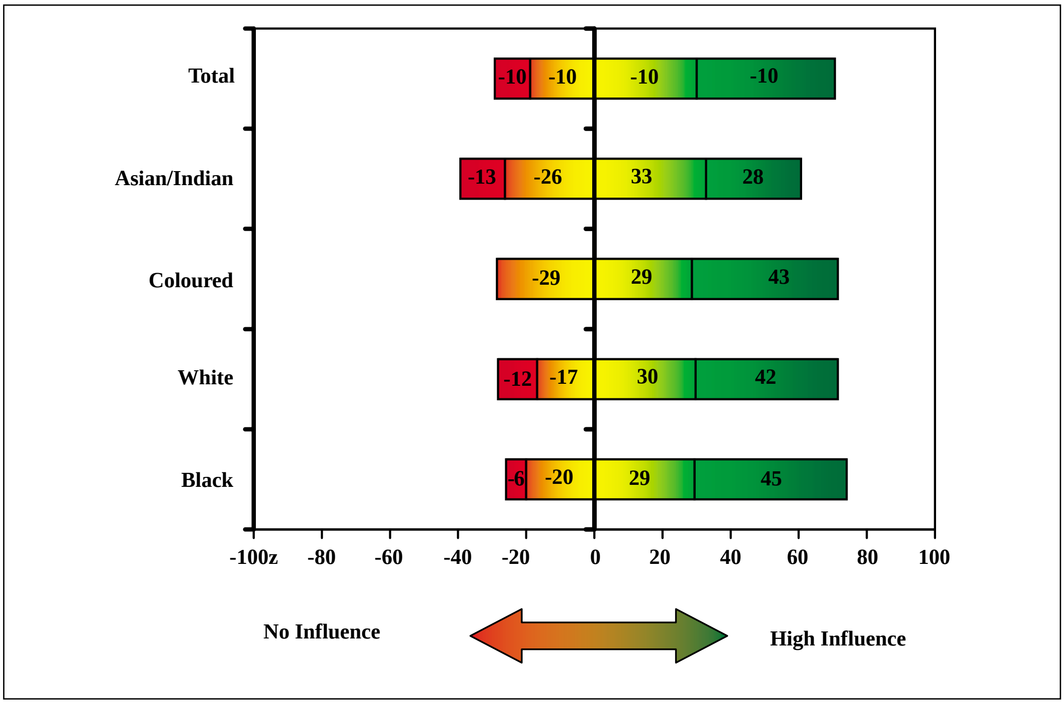
Most Important Aspect(s) when choosing a Holiday



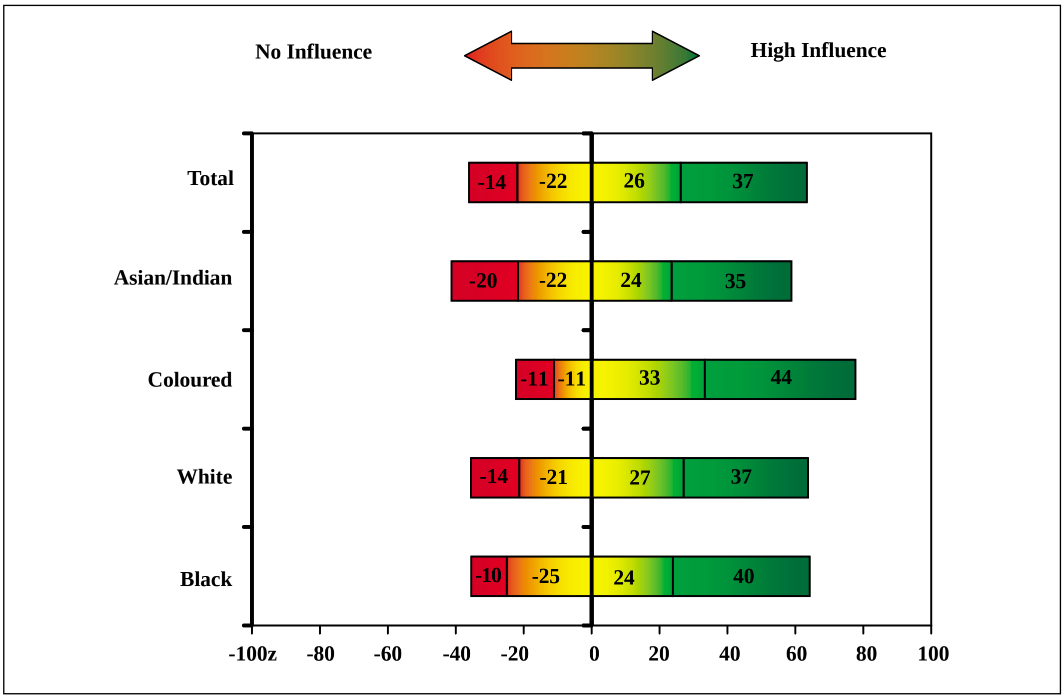
a) Importance When Choosing a Holiday Destination



b) Influence of the value of the rand (alternative destinations)



c) Influence of the value of the rand (reduce length of stay)



d) Best Value for Money For SA Travellers

Zimbabwe	49 mentions	**Mocambique**	19 mentions
Australia	31 mentions	**EEUU**	19 mentions
Hong Kong	25 mentions	**Israel**	13 mentions
Singapore	24 mentions	**North Africa**	11 mentions
UAE	22 mentions	**India**	11 mentions

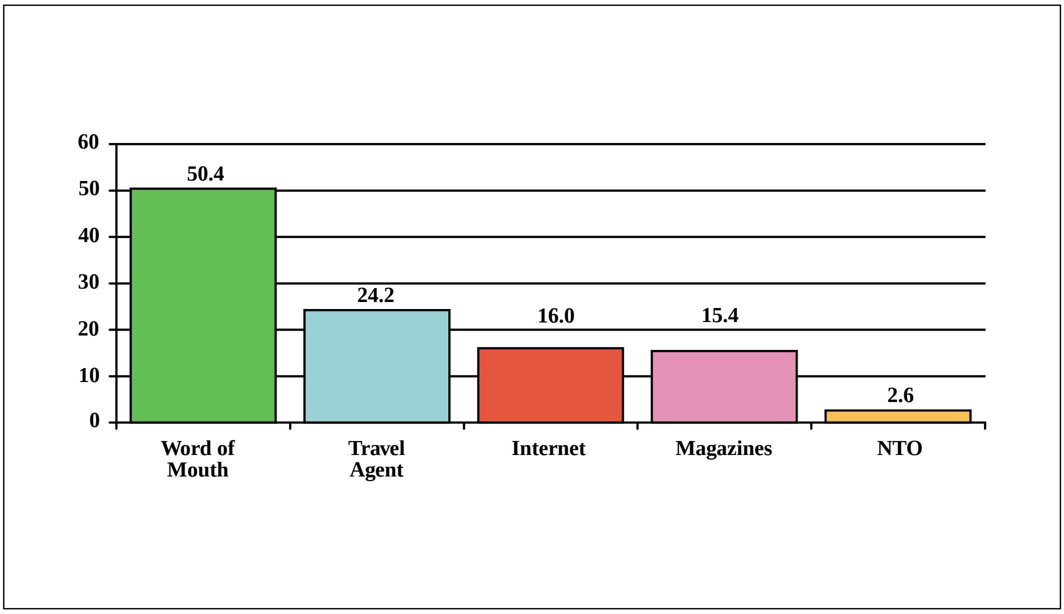
e) Destinations Considered Unsafe

Congo	40 mentions	**Iran**	13 mentions
Israel	26 mentions	**Saudi Arabia**	13 mentions
Angola	24 mentions	**South Africa**	12 mentions
Zimbabwe	17 mentions	**Palestine**	11 mentions
Iraq	14 mentions	**DRC**	11 mentions

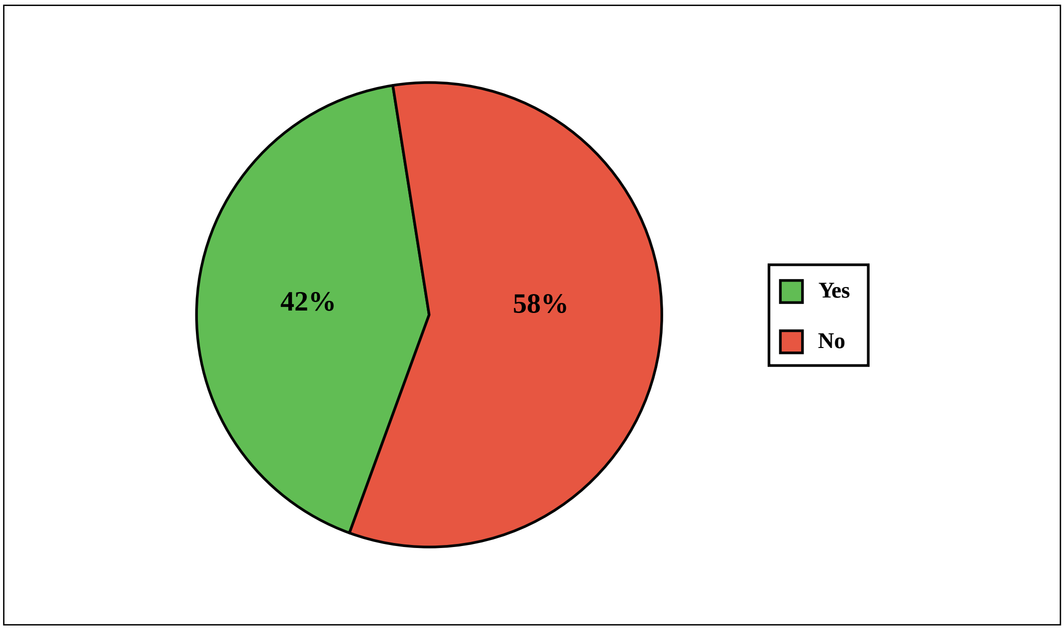
f) Countries Not Visited Due to Difficulty in Obtaining Visas

Australia	5 Respondents
UK	2 Respondents
USA	1 Respondents
Kenya	1 Respondents
Italy	1 Respondents
Russia	1 Respondents
Canada	1 Respondents

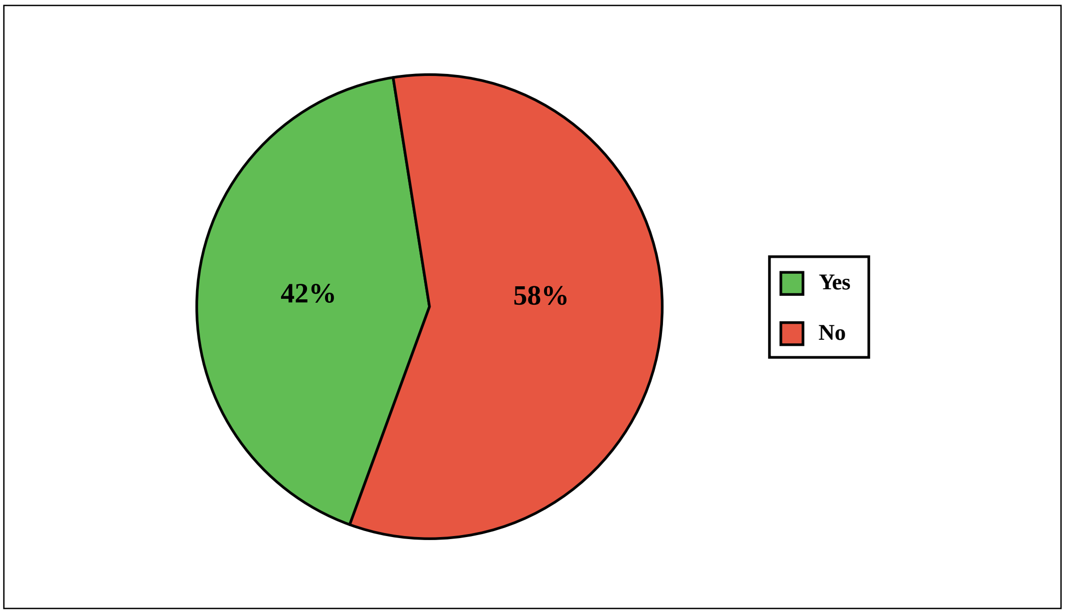
Information Sources



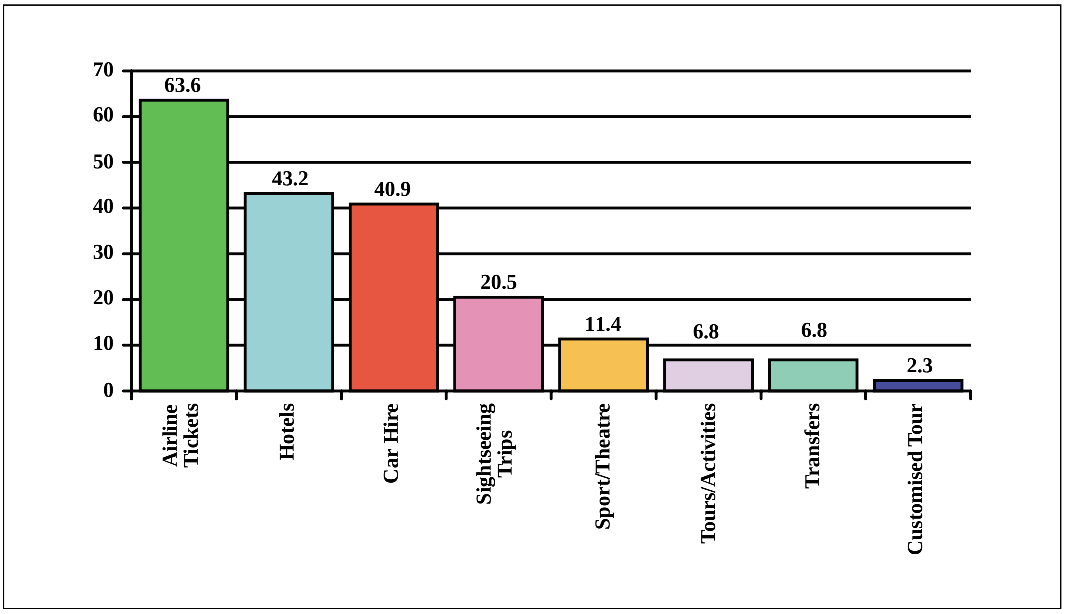
a) Internet Usage to Gather Information on Potential Destinations



b) Internet Usage to Book Travel Arrangements

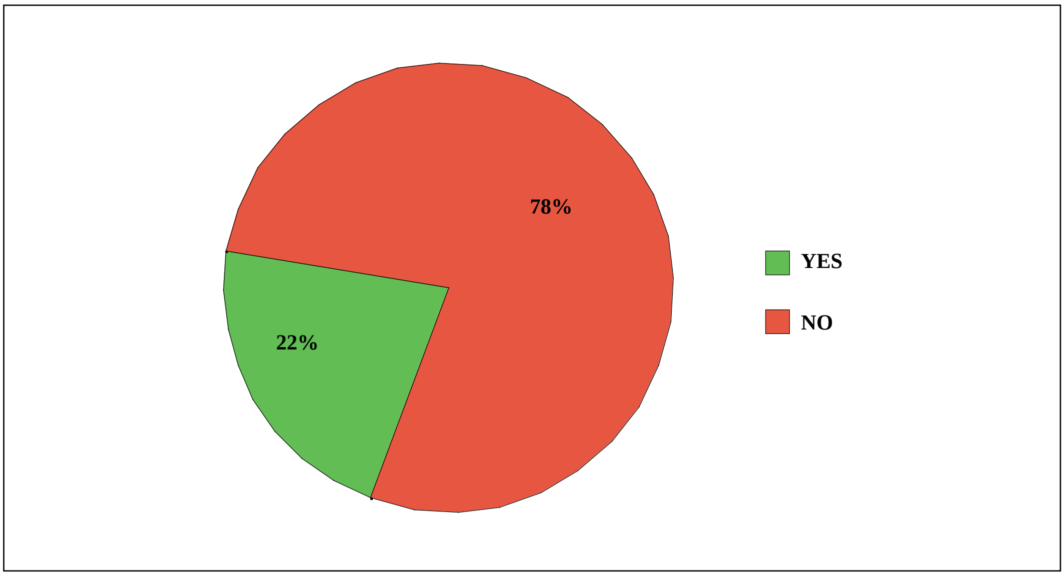


c) Travel products booked via the Internet

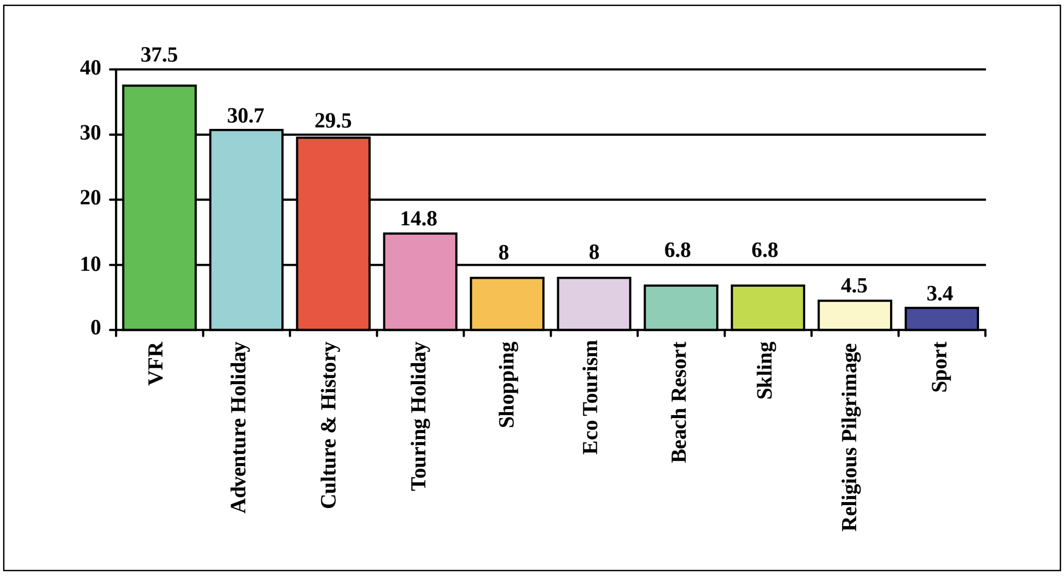


Package Tour

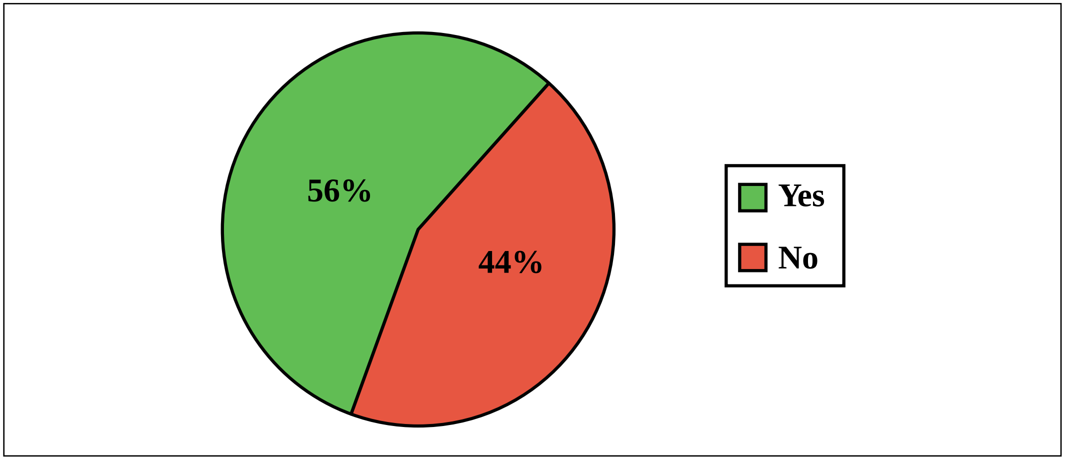
a) Participated in a Package Tour



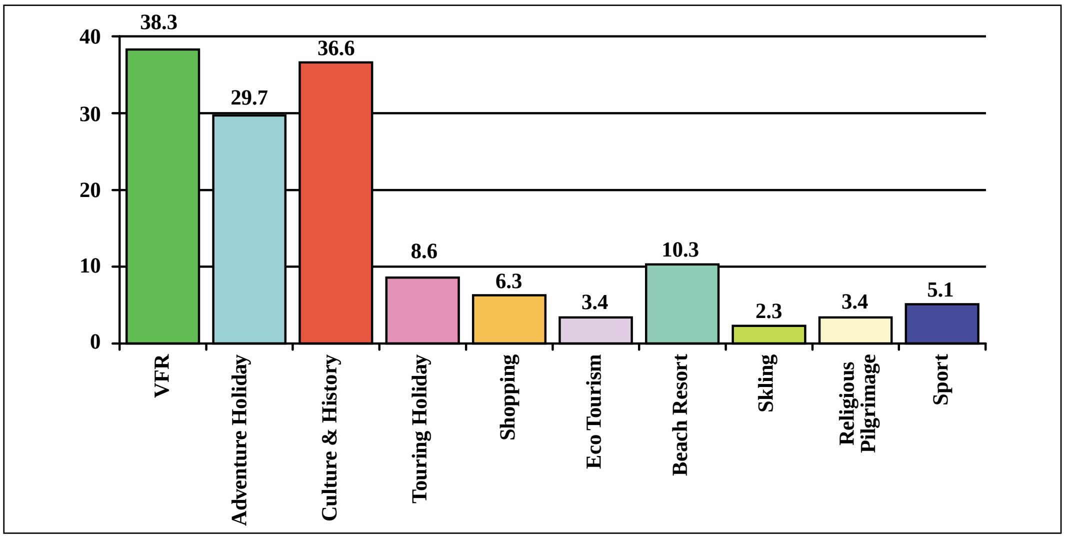
b) Types of package tours experienced



c) If not participated in a package tour, Would you consider it?



d) If yes, What type of package tour?



e) Reasons for not participating in package tours

"Prefer to travel on own"	28.1%
"Too expensive"	19.3%
"Don´t like tour groups"	9.6%
"Not interested"	8.1%
"Can´t do what you want"	5.2%

Conclusions

- Majority of respondents travelling overseas for leisure (46%) and VFR (34%).
- 76% of respondents made use of a travel agent. Predominantly for air tickets, hotel reservations and car hire.
- Circa 21% of respondents who used a travel agent felt the TA had a high to moderate influence on their choice of leisure destination. In general, rising Income = less TA influence.
- Circa 40% of respondents were visiting the UK or Australia.
- Similarly, circa 41% of respondents had visited the UK or Australia more than once.
- The most popular holiday types over the last 3 years were touring, VFR, sightseeing and adventure holidays.
- The most attractive holiday types for the future are adventure holidays, cultural and historical holidays, touring and shopping holidays.
- The USA is the country most respondents would like to visit in the future followed by the UK and Australia.
- Of the 12 respondents who had decided not to travel to a country due to the difficulty in obtaining visas, 5 named Australia and 2 the UK.
- Zimbabwe, Australia and Hong Kong are thought to offer South African travellers the best value for money.
- Value for money considered more important than cost.
- Value of the Rand seen as having a high influence on choice of leisure destination and length of stay.
- Word of mouth the most common source of destination information, followed by travel agents. The Internet is as well utilised as magazines.
- 42% of respondents used the Internet to gather information, only 9% made bookings via the Internet.
- 78% of respondents had not participated in a package tour. Of these 56% would consider participating in a package tour.

Recommendations

- Share the findings with key members of the travel trade and use ensuing discussions to forge stronger working relationships
- Set up a travel agent panel to discuss trends on a quarterly or monthly basis
- Investigate further perceptions of package tours.
- Promote VFR, Culture / History Package opportunities (i.e. flight plus one or more other elements)
- Provide selected travel agents with a one page self complete questionnaire for travellers to complete to determine destinations, length of stay, type of trip etc.
- The Internet is a key source of information for prospective travellers from South Africa – ensure that respective country information is easy to find and link opportunities are maximised

4.1.2. Qualitative phase: interviews with the South African tourist industry

Methodology

In-depth personal interviews were conducted from 5th to 20th March 2001 with representatives of the following tour operators and travel agencies:

- Malaysian Airlines.
- Harvey World Travel.
- Absolute Tours
- Rennies Travel
- Thompson’s Tours

To carry out the interviews, use was made of guidelines drawn up by the consultancy firm appointed for the purpose, pinpointing three areas:

- General topics.
- Topics of interest to the ANTOR.
- Topics of interest to the ETC.

Foreign travel in the Republic of South Africa

a) Its importance

Insofar as South Africans are concerned, foreign travel is, if not more, then at least as important as domestic travel.

Not only do travel agents regard it as more lucrative, but there is evidence that it accounts for a proportionately growing share of the market.

The vast majority of these trips fall into one of the following three categories: business, visits to family and friends, or leisure.

This type of travel is seen by tour operators as being of great interest to their respective companies, given that it can account for 50%-60% of their turnover (indeed, in some cases this figure is even higher). Moreover, and by way of a complement to the above, the perception of the domestic market is one of saturation, which accounts for the interest in the tourist-generating market.

Travel agents attach great importance to travel abroad from South Africa, since it represents the lion's share of their business (approximately 65%). It is likewise estimated that earnings from foreign travel are rising by a very considerable amount. The domestic market, in contrast, does not appear to be enjoying such good health.

b) Ratio and growth areas

Tour operators surveyed point to the rapid growth of foreign versus domestic travel, especially in geographic areas such as the Far East, Europe and the USA. Against this, the popularity of southern African destinations, such as Zimbabwe, has been affected by the prevailing political instability.

Travel agents too are of the opinion that the foreign travel market is on the rise, albeit with declining commissions for them.

c) Market description

To tour operators as a whole, foreign travel is the top segment in terms of quality and earnings. Added to this is the fact that demand for foreign travel extends to other, not quite so exclusive, high-quality segments ("yuppies") and families. In this respect, tour operators see South African tourists as being very adventurous and ready to experience new things. They also point out that, whereas arranging business trips is something handled by secretaries, leisure travel is handled directly by their bosses, thereby implying a far more exacting level of demand. Lastly, it should be noted that there is a widely held perception in the market of the existence of keen competition among the 5 leading tour operators, viz., ATO, World Leisure, In Vogue, Thompson's and Absolute Tours.

Travel agents, for their part, describe the foreign travel market as being equally divided between business, visits to family and friends, and leisure products. Analysis in terms of organisation shows that, with the exception of business trips, half of all foreign travel is organised and the other half, independent (i.e., flight plus additional services). Viewed by segment, the upper segment is seen to be expanding as a result of the process of economic globalisation, whilst the lower segments are shrinking. Whatever the case, however, clients tend to be very demanding, owing to the high standard of living enjoyed in South Africa. In general, travel agents consider the South African foreign travel market to be extremely price sensitive and the tourist sector as highly competitive.

Foreign destinations

a) Principal destinations.

From the replies furnished by of the South African tourist-industry representatives surveyed, the following are the main foreign destinations being marketed:

- Indian Ocean islands (Seychelles, Mauritius)
- Far East – Asia / Pacific (Australia)
- Continental Europe.
- The Mediterranean.
- London – United Kingdom.
- New York – USA.

b) Destinations proving more difficult to sell:

The sector feels that it is easier to market destinations for which contractual agreements with local tour operators are already in place.

Certain “out-of-the-way” destinations, such as Scandinavia and South America, are difficult to market, and the same applies to those about which clients have relatively little information and to others which are situated near tourist destinations that are also principal points of entry, an example of this being Paris or Amsterdam vis-à-vis London.

Ultimately however, it is the question of obtaining visas that represents the greatest problem for professionals in the tourist sector.

c) Principal types of vacations.

According to the tourist-sector representatives surveyed, the types of vacations most sought after by South African tourists are as follows:

- Visits to family and friends.
- Skiing
- Cultural tourism.

- Active and adventure tourism
- Circuits (including special interest circuits, such as visiting the classical ruins in Athens)
- Eco-tourism
- Shopping
- Sun and sea
- Local cuisine and eating out
- Scuba diving

d) Principal consumer segments

Broken down by income level, the leading leisure-travel consumer segments lie in the upper income strata (groups A and B). Specifically, the upper income segment is seen as group that accounts for a relatively small volume in quantitative terms but nevertheless provides tour operators with high profit margins. The latter complain, however, that the situation is now changing and profit margins are becoming increasingly narrower.

Other segments regarded as advantageous are corporate travel and top-of-the-range package holidays.

The industry tends to divide the market into segments according to the different foreign destinations, and then undertake *ad hoc* advertising campaigns, e.g., high-intensity campaigns are launched to coincide with the South African winter and so target foreign summer destinations.

It is segmentation by principal product line that draws the distinction between business and leisure travel, with the latter, in turn, being subdivided into visits to family and friends on the one hand, and package holidays on the other.

With respect to segmentation by race or ethnic group, while all tour operators and travel agents surveyed were of the opinion that the growing purchasing power of the emerging black African middle class could change the market in the medium term, they did not plan on using a differentiated marketing strategy for this particular segment, as they felt that its behaviour patterns were similar to those of the established middle class.

The recent downward fluctuation in the value of the Rand is a cause for concern among representatives of the tourist sector, who feel that if this trend continues, even the groups having the highest purchasing power will be affected. In general, there are signs of an increase in ticket sales to more reasonably priced destinations in the Far East. The volatility of the Rand is also affecting the sector itself, which complains that the exchange rates which they are quoted are only valid for 48 hours.

Other internal aspects, aside from the Rand exchange rate, capable of influencing the tourism and travel market are: simplification of bureaucratic border checks and formalities; the holding of major special-interest events (festivals and sports events); and the process of rationalisation in which airline companies are currently involved.

Sources of information used

a) Travel agents

The perception in the sector is that, although travel agents continue to be a decisive influence when it comes to choosing a given destination, their importance is dwindling. Indeed, agents are observed to be travelling less and less, with the result that they have become far less knowledgeable about the various destinations and therefore need greater support and back-up from the tour operators. Their most important role at the present time may arguably be to help clients decide on the towns, cities or specific points to be visited in any given country or region.

b) Internet

Research shows that a growing number of end-users (approximately 50% of outbound South African tourists) browse the Internet to gather information on destinations of interest to them, and then make the necessary bookings at their travel agency.

Current estimates put the percentage of travellers who make on-line bookings over the Internet at a figure of scarcely 0.1%. This low percentage is due to lack of knowledge as to the most appropriate Web sites and lack of facilities for transactions. Even so, it should just be recalled here that, in the USA itself, the percentage of people who book via the Internet is very small and stands at under 3%.

c) Tourist Office

In the opinion of a number of tour operators surveyed, foreign Tourist Offices do a great job in spite of the limited nature of their budgets. Nevertheless, the feeling is that they have yet to produce the formula best suited to promoting the destinations they represent. Specifically, the Australian, Indonesian and Malaysian delegations receive unanimous praise, whilst those from the various European countries are rated less positively. Be this as it may, however, relations between Tourist Offices and tour operators are fluid and continuous, with the latter making good use of the information and promotional material furnished by the former. Equally highly regarded by the tourist sector are Tourist Office-sponsored training activities and presentations of products and destinations, particularly those organised under the aegis of the Association of National Tourist Offices in South Africa (ANTOR).

Europe as a tourist destination for South African tourists

a) Principal trends

- London still ranked as the most popular European destination.
- Ireland becoming fashionable, especially among the youngest segment of the population.
- Demand for travel to visit family and friends remains constant.
- Detectable growth in the youngest age segment seeking ‘working holidays’.
- As a product, skiing continues to register magnificent levels of sale.
- Europe, in general, becoming a more costly destination, owing to the Rand exchange rate.

b) Reasons for the growth in European destinations

- Increasing Europe-bound leisure travel thanks to cheaper air fares.
- Package holidays offering good value for money.
- Well-promoted package holidays.
- Heightened awareness among consumers as to the range on offer in the market place.

c) Products with large untapped potential

- Increased market niches, such as skiing and sports tourism in general.
- Trips combining business with pleasure.
- Special interest circuits.

d) Suitability of European products for the South African market

Tourist-sector members surveyed feel that Europe has a great potential for South African tourists and is being well marketed. They feel too that, if costs could be kept within certain limits, European destinations could be adapted to the needs of said travellers. To this end, however, a series of changes ought to be made, both in promotional activities, such as highlighting special interest circuits (e.g., bullfight tour of Spain), and also in the presentation of package holidays, with the greatest possible number of items being included in the overall price. Yet this perception was paralleled by that of other tourist-sector representatives, who felt that currently implemented strategies were proving successful and that no wide-ranging changes were called for.

e) Main competitors to European destinations

- Indian Ocean islands
- USA
- Far East
- Australia

f) Principal positive factors associated with European destinations

- Rich cultural life.
- Historical and artistic heritage.
- Feeling of belonging or having ties with a particular community (e.g., the British in the case of the United Kingdom).
- Safety.

g) Principal negative factors associated with European destinations

- Different languages.
- Attitude of the locals (somewhat unfriendly and unhelpful).
- Muggings and theft affecting tourists.

- Poor weather.
- High cost for South African tourists, owing to poor Rand exchange rate.
- Travel agents not fully conversant with the product.

h) Reasons for cancelling trips to Europe

- Personal reasons (illness or death of relatives).
- Lack of cash.
- Value of the Rand.
- Work commitments.

i) Destinations that promise to show the greatest growth in then next 3 years

COUNTRY	SPONTANEOUS MENTIONS	PROMPTED MENTIONS
Austria	—	—
Belgium	—	—
Bulgaria	—	1
Croatia	—	—
Cyprus	—	1
Czech republic	2	—
Denmark	—	—
Estonia	—	—
Finland	—	—
France	1	—
Germany	2	—
Greece	2	—
Hungary	1	—
Iceland	—	—
Ireland	2	—
Italy	4	1
Luxembourg	—	—
Malta	—	—
Monaco	—	—
Netherlands	1	1
Norway	—	—
Poland	—	—
Romania	—	—
Slovenia	—	—
Spain	4	2
Sweden	—	—
Switzerland	1	2
Turkey	1	1
United Kingdom	4	—
Portugal	—	2

j) Features and products (Attraction ratings)

FEATURES AND PRODUCTS	Excellent	Good	Average	Poor	Very poor	N/I
Availability of air and hotel packages	4	2	—	—	—	—
Inexpensive travel to the country	4	2	—	—	—	—
Personal safety even when travelling alone	4	2	—	—	—	—
High standards of hygiene	3	2	1	—	—	—
Inexpensive travel within the country	3	2	1	—	—	—
Good public transport	2	4	—	—	—	—
Overall rating of Europe as a vacation destination	1	5	—	—	—	—
History	2	3	1	—	—	—
Inexpensive restaurants	2	3	1	—	—	—
Activities for the entire family	2	2	2	—	—	—
Budget accomodation	1	4	1	—	—	—
Arts and culture attractions (live theatre, dance, opera, ballet, galleries, etc.)	2	1	3	—	—	—
Night life and entertainment	2	1	3	—	—	—
Outstanding scenery	1	4	—	1	—	—
Ease of driving on own at destination (car hire, insurance, signage, maps)	1	2	3	—	—	—
First class hotels	1	2	3	—	—	—
Shopping experiences	1	2	3	—	—	—
Opportunities to experience a country uniqueness	1	3	1	1	—	—
Beaches for sunbathing and swimming	—	4	2	—	—	—
Opportunity to experience a different culture	—	4	3	—	—	—
High quality restaurants	2	1	1	2	—	—
Royal palaces	—	3	3	—	—	—
Visiting historical and archeological sites	—	2	4	—	—	—
Visiting remote coastal areas and attractions	—	1	5	—	—	—
Monarchy	—	3	1	2	—	—
Local cuisine	1	1	3	—	—	1
Opportunity to drive around on one´s own	1	2	1	1	—	1
Interesting and friendly locals	1	1	2	1	—	1
Opportunity for a learning vacation	—	1	3	2	—	—
Exotic atmosphere	—	1	2	2	—	—
Chances to see unique wildlife, bird, flowers	—	—	3	2	1	—
Visits to ecological sites, nature / animal reserves	—	—	3	2	1	—
Wilderness adventures	—	—	3	2	1	—
Local crafts	—	—	4	1	—	1

k) Top three most useful services in helping to sell Europe as a destination

	Essential	Valuable	Nice to have
New releases and updates on special events	1	3	1
Trade press advertising	3	2	1
Consumer advertising	4	—	1
Familiarisation tours	2	5	—
Slide/film shows and lectures	1	2	2
Joint promotions with travel wholesalers	3	1	1
Personal sales calls and meetings	—	1	4
Point of sale and display material	1	3	1
Leaflets and brochures	4	1	—
Training programs	3	2	—
Trade shows	—	3	2
Networking	1	3	1
On-line services (Internet)	2	3	—
National tourist offices	4	1	—
Direct mail	1	2	2
Travel video tapes	2	3	—
Travel magazine articles	4	1	—
Reference material on destination	2	3	—

4.2. TURESPAÑA STUDY. SOUTH AFRICAN TOURISTS IN EUROPE PROFILE

The following data were gathered from a questionnaire completed by travel agencies and tour operators that took part in the Turespaña Workshop held in September 2000 in Johannesburg and Cape Town. It should therefore be borne in mind that some data might not be completely objective, in that the sessions were organised by Turespaña and Iberia, and so any agencies attending can thus be assumed to have a special interest in Spain, for this reason no results showing destination preferences are provided here.

In order to be able to study the preferences of clients of travel agencies and tour operators more accurately, the latter have been broken down by the type of product in which they specialise. These fall into four main groups:

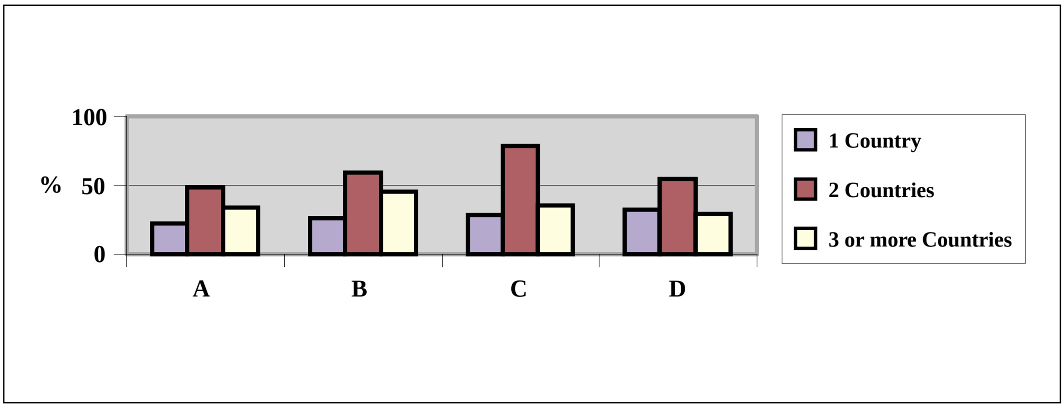
A - LEISURE
B – BUSINESS AND LEISURE CLIENTS
C – GENERAL (ALL TYPES OF TRAVEL)
D – INCENTIVE AND BUSINESS CLIENTS

Furthermore, parallel surveys were conducted among visa applicants at the Spanish Embassy and Consulate. Analysis of the these questionnaires has served to obtain approximate data on South African tourist preferences, though it has to be said that a great proportion of these interviewees were businessmen and -women.

4.2.1. Number of European countries visited on tours of several countries

The vast majority of travel agents state that their clients visit at least two countries on their trips to Europe. The bar graph shown below indicates that a high number of South African tourists visit a minimum of more than one European country on the same trip. This confirms the multiplicity of visits to countries on a single trip.

Number of countries visited o a single trip

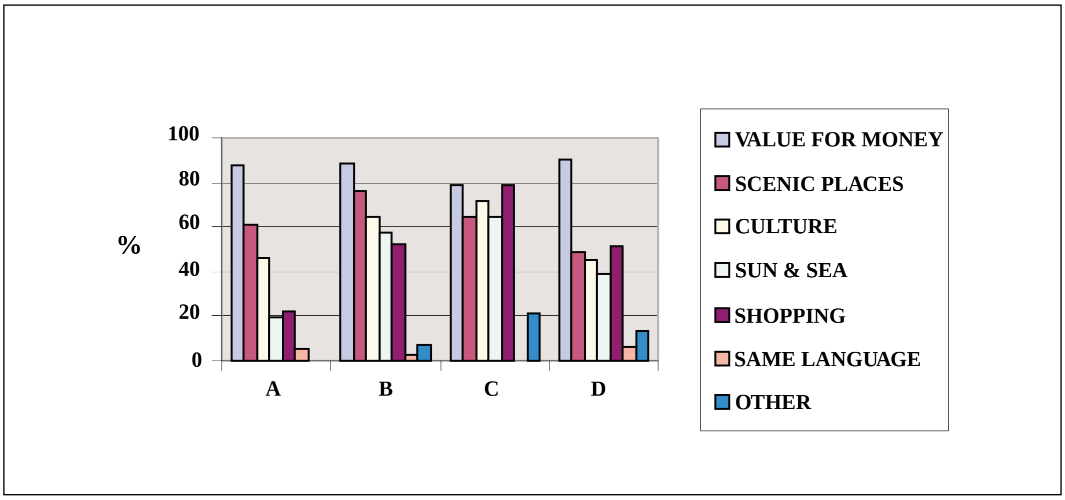


These data likewise serve to confirm the difficulty of accurately estimating the real number of South Africans travelling to each European country and to Schengen Treaty states in particular, where the issue of a visa by the Embassy of any one member state gives visa-holders the right of entry to all the remaining member states.

4.2.2. Features of most popular tourist destinations

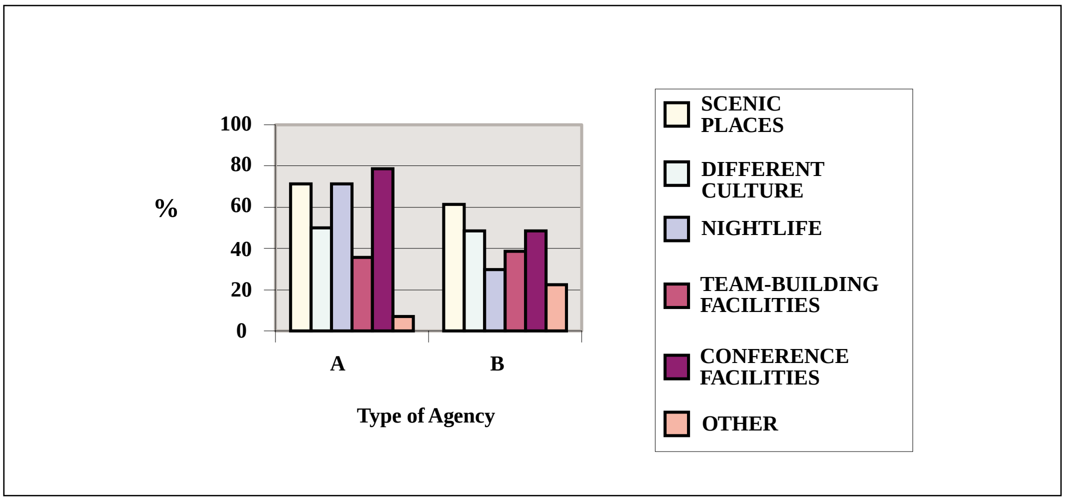
As will be observed from the following graph, regardless of the type of travel agency (and, by extension, the type of client), when it came to choosing the tourist destination the most important factor in every case was value for money. Other destination features stressed by travel agents and tour operators were, according to their customers' specific requirements, the scenic beauty of the proposed destination, the cultural appeal of same and shopping. In contrast, not much importance was attached to the difficulty posed by the fact that the language spoken in the tourist destination might be different to the tourist's mother tongue.

Features of Tourist Destinations



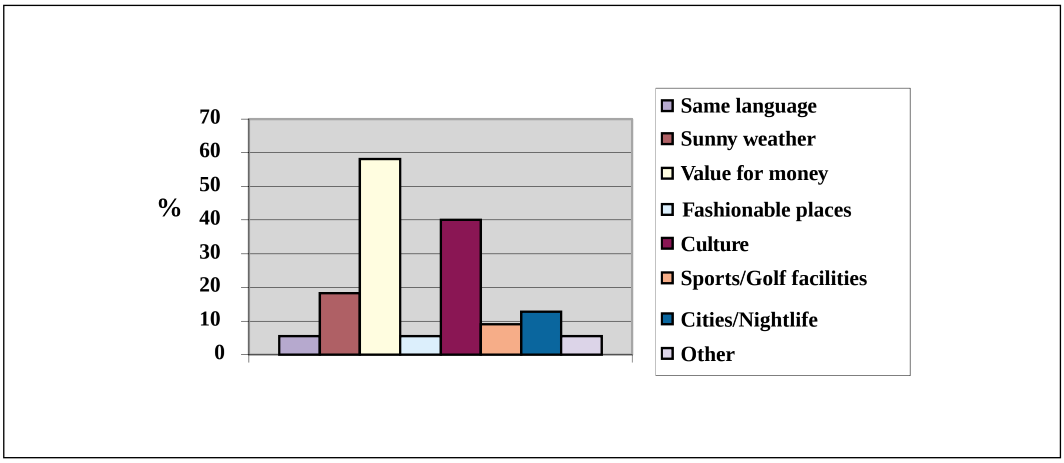
As the graph below shows, in the specific case of incentive travel the essential elements sought by companies when choosing a venue were: scenic beauty, a different culture and conference and team-building facilities, with emphasis also being laid on the importance of a lively night life.

Features of Incentive Travel Destinations



From the individual tourist's stance, it is clear from the graph below that travellers are primarily seeking value for money (58.2%), followed by destinations of cultural interest (40%) and sunny weather (18.2%).

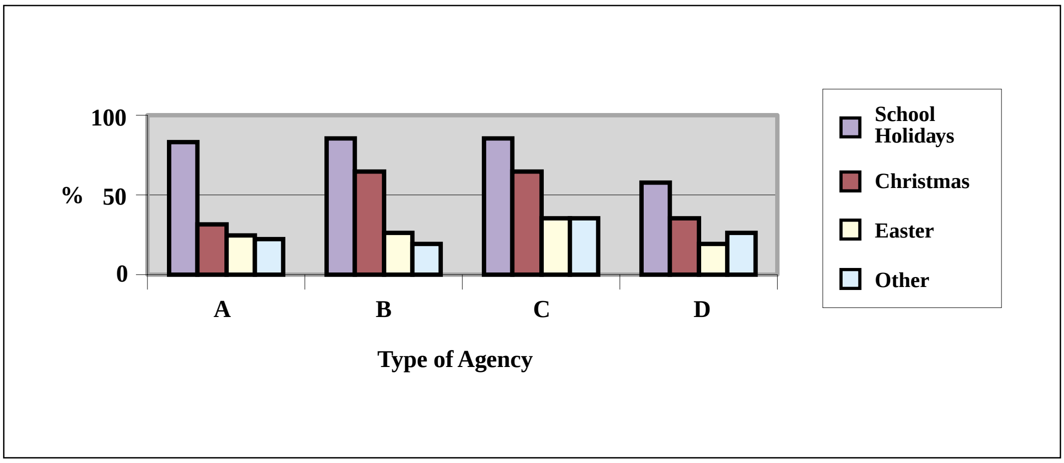
Features of Tourist Destinations



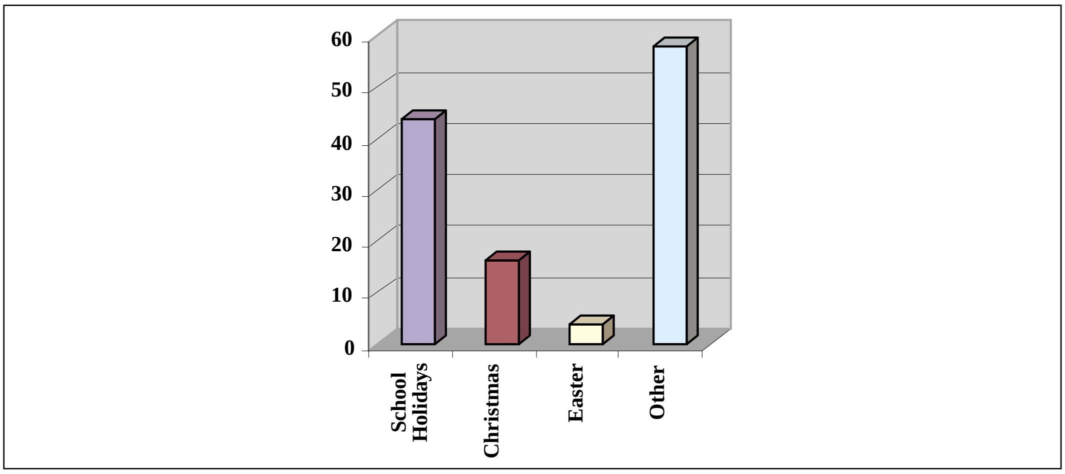
4.2.3. Most popular times of the year for travel to Europe

The time of year chosen by South African tourists to travel to Europe depends upon the type of travel-agency client. While the summer school-holiday period is the most popular for travelling abroad, followed by the Christmas season, it must be borne in mind that businessmen travel all year round and incentive trips tend to be organised out of peak season.

Most popular times of the year for travel to Europe



Time of the year for foreign travel

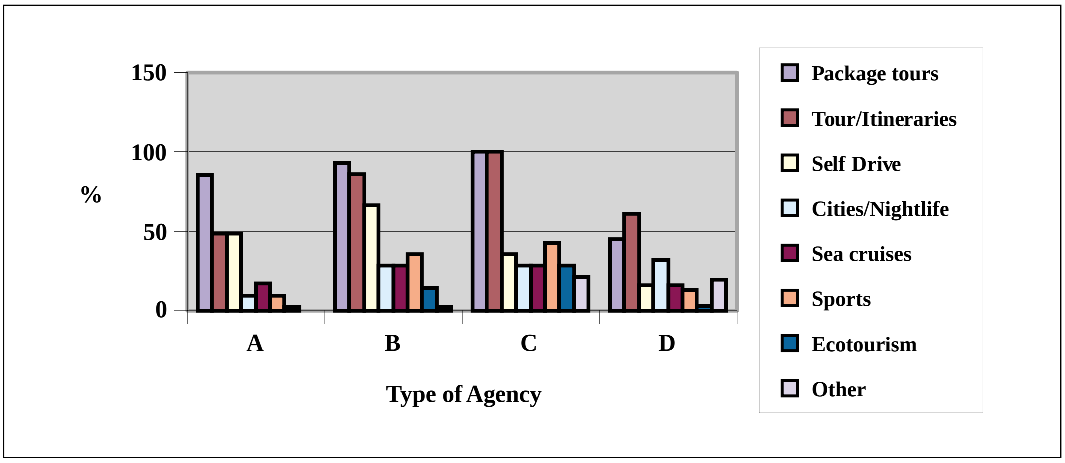


When the same question was put to individuals, the result was similar, with the school-holiday period being ranked a clear first, Christmas second, and the "Other" column reflecting the behaviour pattern of businessmen and –women, since they travel all year round.

4.2.4. Package Tours to Europe

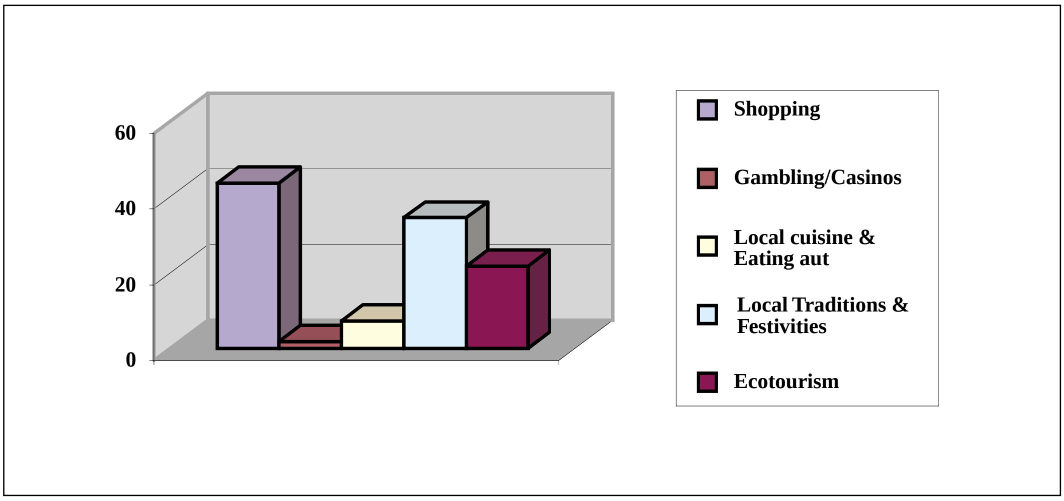
Based on the data shown below, the best-selling tourist products handled by travel agencies and tour operators, particularly those specialising in leisure tourism, would appear to be "Package Tours" and "Tours and Itineraries", with Self-Drive" also featuring prominently in the rankings. Similarly, in the case of agencies dealing in incentive travel, package tours that combine cites and a lively nightlife were highly rated.

Tipe of product sought



Among the special interests pursued by South Africans on holiday, shopping merited first place (43.6%) followed by local traditions and festivities (34.5%) and eco-tourism (21.8%). Curiously not much importance was attached to gambling, something that is remarkable in the light of South Africans' interest both in casinos and in the more recent lottery. Their interest in eco-tourism comes as no surprise however, seeing as this is the single greatest attraction of all countries bordering on South Africa. Furthermore, the reported interest in local traditions and festivities was to be expected, given the stress laid upon different culture as one of the attractions for South Africans when it comes to choosing a holiday destination.

Other leisure travel interests

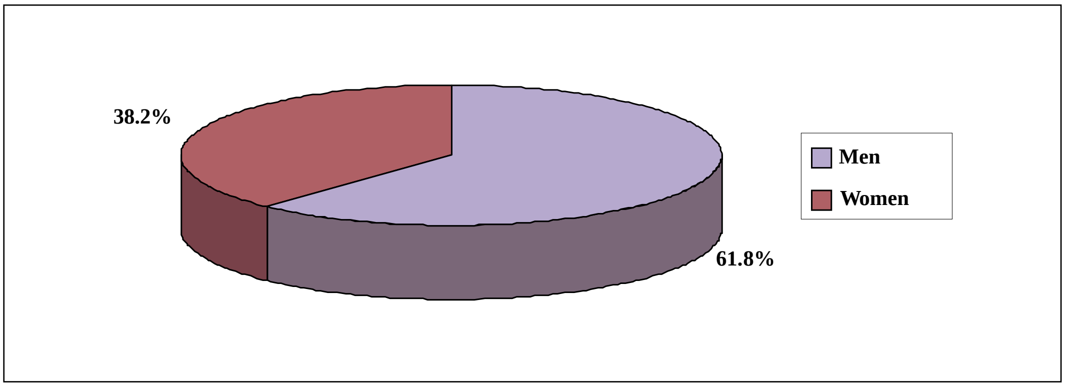


4.2.5. Socio-demographic profile

Breakdown by sex

Of those who completed the questionnaire, 61.8% were men and 38.2%, women. This indicates that among South Africans it is men rather than women who tend to travel to Europe. However, it should be recalled here that the sampling was neither very extensive nor at random, thereby giving rise to a high margin of error. It is therefore possible that a larger, more comprehensive study might well yield different percentages.

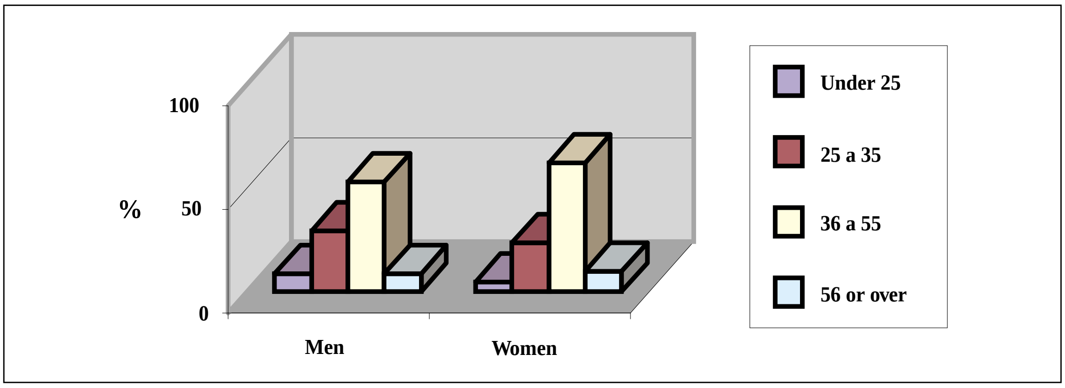
South African Tourists by sex



Breakdown by age

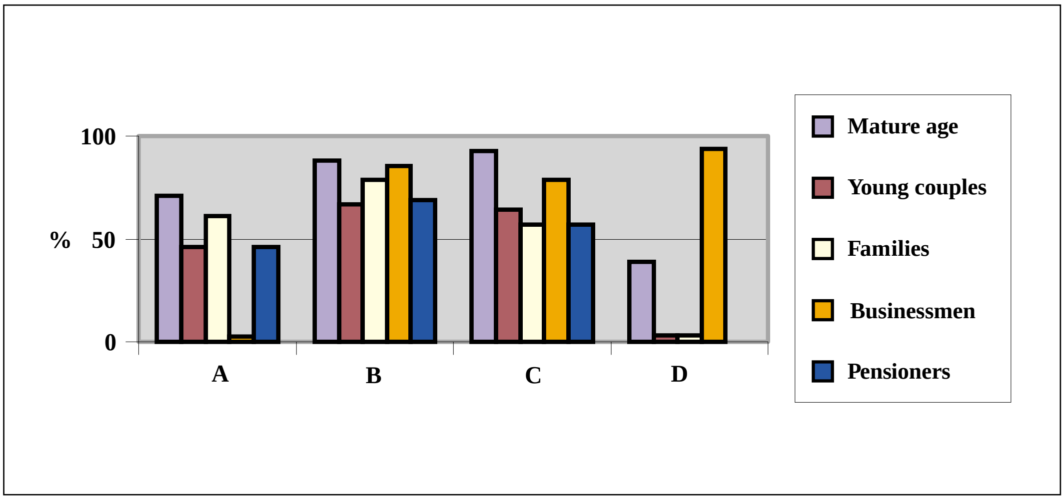
On the basis of surveys undertaken, it can be concluded that, of the 61.8% South African men who applied to the Embassy for a visa, the majority (53%) were aged from 36 to 55 years, with the second highest percentage in the 25-35 age group (29.4%). As the graph below shows, the same pattern was seen in women, with the largest proportion (38.2%) aged 36-55, again followed by the 25-35 age group.

South African Tourists by age



As their best clients, the various travel agencies and tour operators listed the middle-aged, young couples and families. However, a glance at the graph will show that clients' age tended to vary with the type of product in which the agency specialises. This was particularly so in agencies devoted to business and incentive travel, a field in which businessmen (93.5%), a group characterised by a notably wide age range, and middle-aged persons (38.7%) tend to dominate. In contrast, in agencies specialising in leisure or general travel, the percentage difference between one and another age group was not as marked.

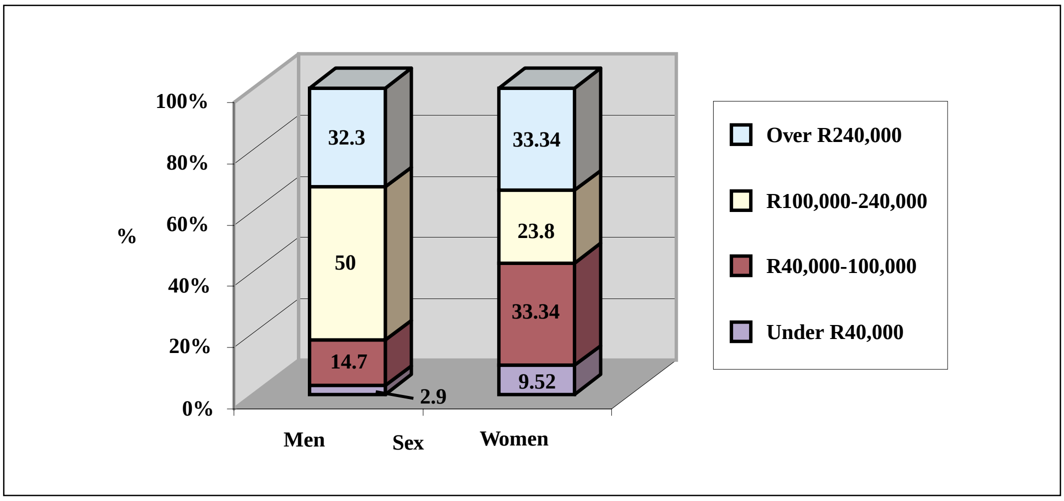
Type of Client



Breakdown by economic level

The annual income of South African tourists engaging in foreign travel is depicted in the following graph. The group has been broken down by sex to enable such tourists to be more accurately profiled. Whereas among men, the highest percentage (50%) was accounted for by the R 10,000 – R 240,000 income bracket, among women the R 40,000 – R 100,000 and R 240,000 or over income brackets accounted for 33.3% each, with the intervening R 100,000 - R 240,000 income bracket proving smaller (23.8%) than in the case of men.

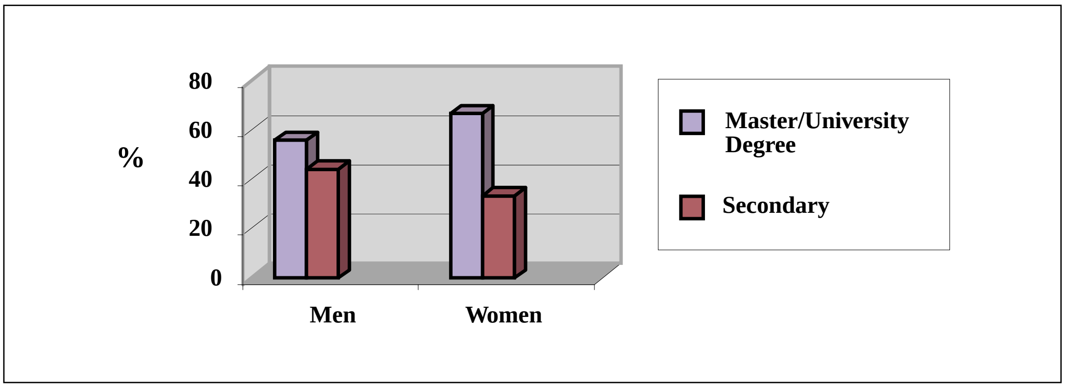
South African tourists by Educational Leval



Breakdown by educational level

As shown below, the educational level of South African tourists can be reckoned as high. The majority of men (55.9%) and women (66.7%) were university graduates, with some even holding Master's degrees. This could be regarded as an influencing factor when it comes to choosing a tourist destination, a finding that reinforces the above-mentioned choice of "Destinations of Cultural Interest" as posing one of the greatest attractions of any tourist destination for South Africans.

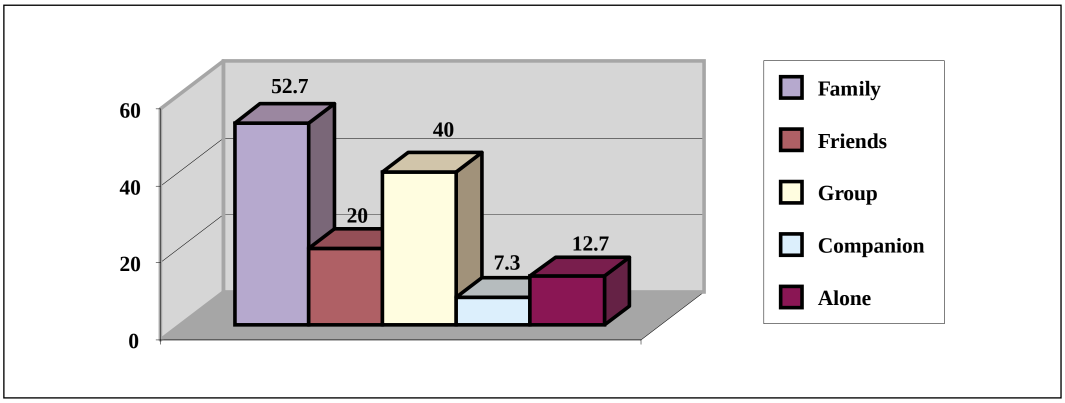
South African Tourists by Educational Level



Breakdown by travelling companions

The majority of South Africans travel in the company of their families (52.7%), a factor directly linked to the time of year chosen for overseas travel, i.e., in most cases the annual school holidays. Ranking second was group travel (40%), followed by travel with friends (20%).

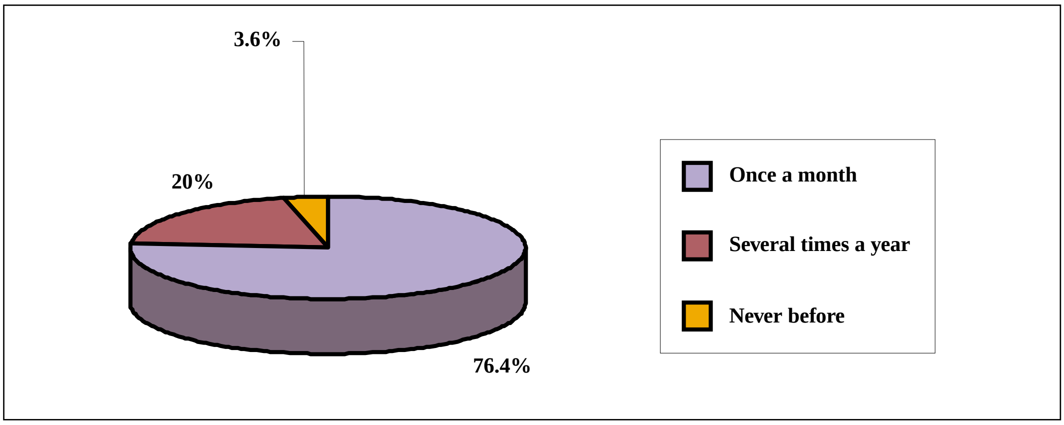
Travelling Companions



4.2.6. Frecuency and duration of travel

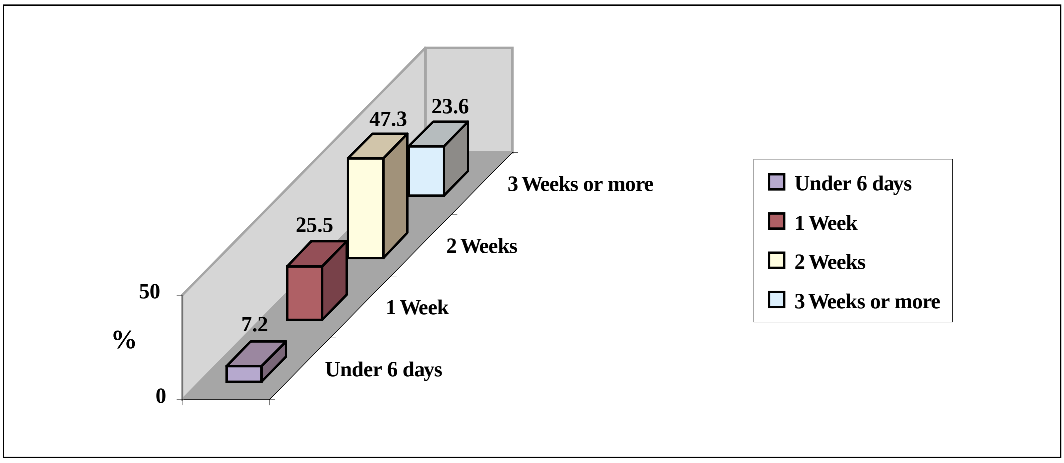
Surveys conducted among individual tourists show that a large proportion tend to travel abroad "at least once a month" (76.4%). As mentioned above, this high figure indicates that a high percentage of tourists surveyed were businessmen and -women. Occupying second place were those that travelled "Several times a year", accounting for 20% of the total.

Frecuency of Foreign Travel

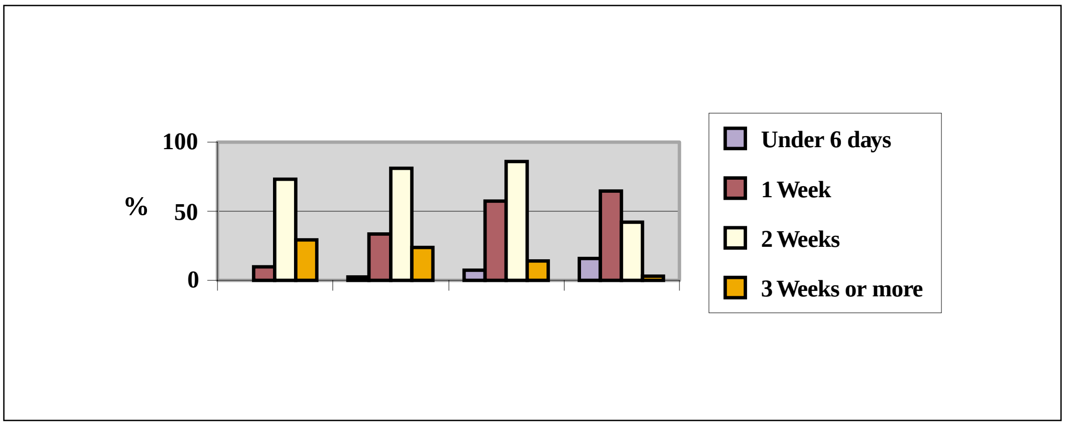


Whether from the perspective of the various types of travel agencies and their clients or the personal views as expressed by individuals, there was consensus as to the fact that, when travelling abroad, South African tourists generally spend at least two weeks away, save in the case of incentive and business travel where trips of one week's duration were the norm.

Duration of Foreign Travel as reportd by tourists



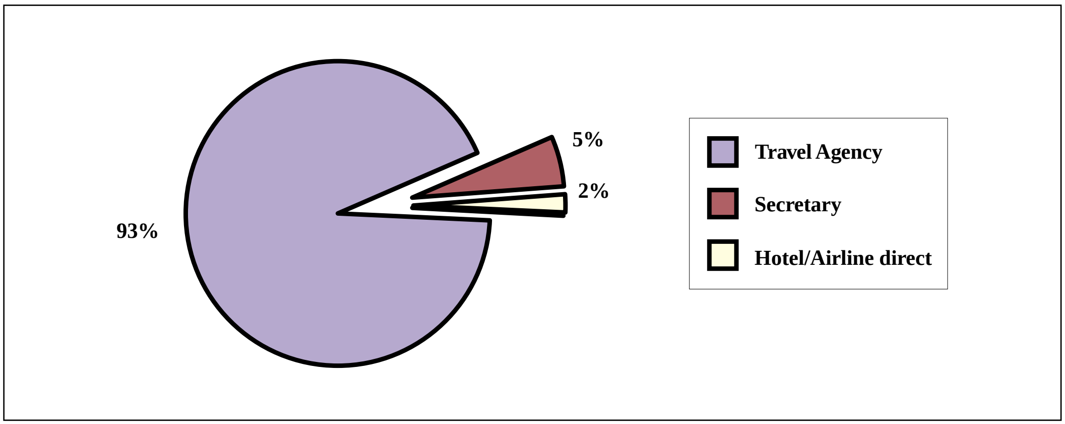
Duration of Foreign travel as reported by Travel Agencias and ther Clients



4.2.7. Source of information and bookings

The immense majority of South Africans (92.7%) tend to go through travel agencies when booking trips. Only 5.5% do so via their secretary (in the case of businessmen), and a negligible 1.8% book directly with the airline or hotel.

Booking methods



These data underscore the vital role played by travel agents in the travel decisions of South Africans. In the final analysis, it is the travel agent who can influence a client's choice of tourist destination and, to this end, it is thus essential for all such agents to be totally conversant with the different tourist destinations and products being offered by the various tour operators.

European guide books

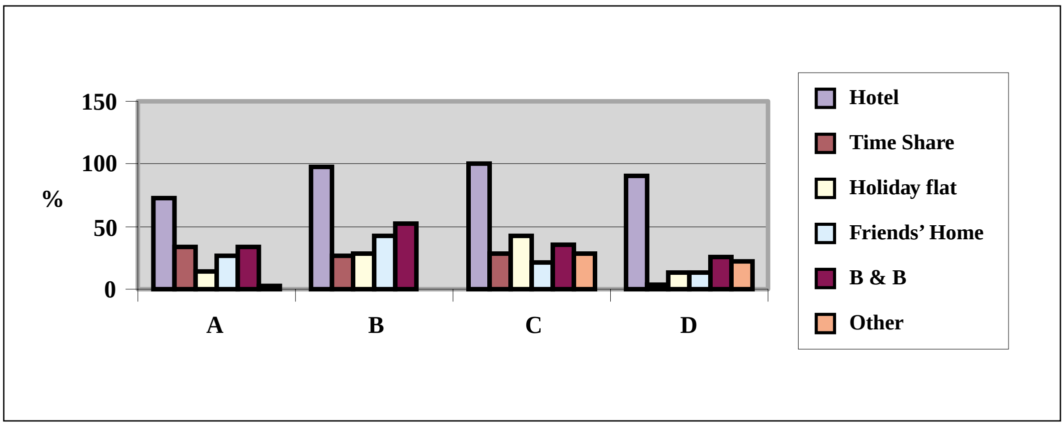
A wide array of travel guides to European countries is to be found on the shelves of most South African bookshops. These range form the best known, such as the Michelin, Lonely Planet or Berlitz, to other less well-known though equally informative guide books. Within this broad selection, there are some that furnish general information on Europe and others that focus specifically on a particular European country or city. Furthermore, there are specialist guide books dealing with specific topics or interest areas, such as hotels, youth hostels, National Parks, train journeys, pilgrimages, Jewish sites (synagogues, restaurants, medieval Jewish cities, etc.).

A list of travel guides to Europe or European countries can be found in the annexes.

4.2.8. Type of accommodation preferred

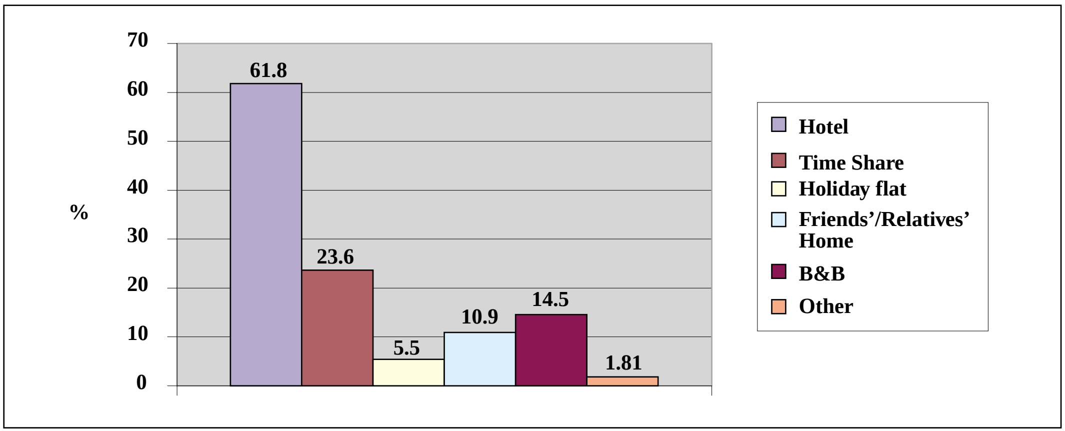
According to information furnished by travel agencies and tour operators, when it comes to accommodation 61.8% of their clients prefer hotels. There is also a sizeable proportion of South Africans who rely on time-share lodging for their vacations (23.6%), which is not surprising given the fact that RCI (the Time Share group belonging to AVIS) is well established in South Africa. A further high percentage (14.5%) seeks bed & breakfast accommodation. It should be remembered here that B&B establishments are to be found the length and breadth of South Africa and their category can range from truly luxurious country cottages or even town houses to the simplest, easily affordable type of lodging. The fact that many European countries have no designated category for the comparable type of lodging makes assessment of this reply difficult, since B&B can refer to the equivalent of country cottage, boarding house or guest house.

Type of Accommodation required by Type of Agency



Comparison of the data plotted in these two graphs will show that where accommodation preferences are concerned, what tourists demand tends to coincide with what travel agents sell.

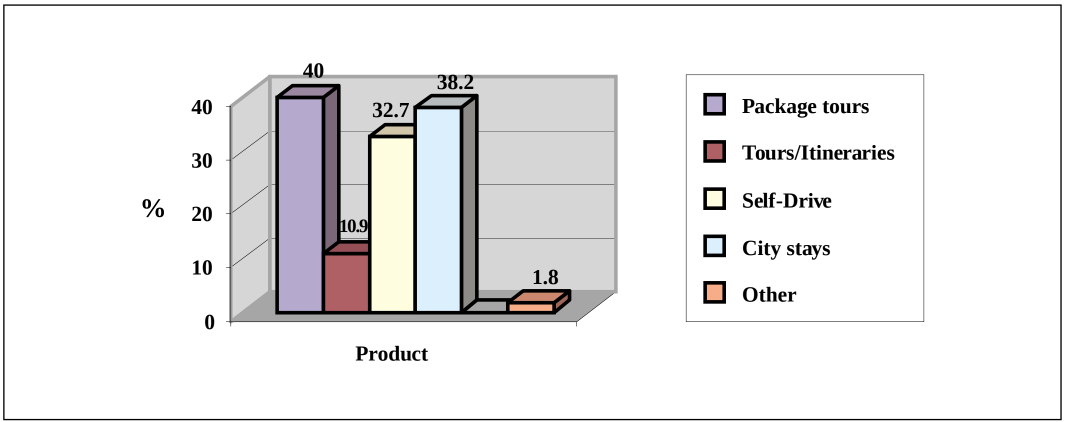
Type of Accommodation preferred by South Africans



4.2.9. Style of travel

When making their travel arrangements, South African tourists prefer package tours (40%) and city stays (38.2%), as options that afford them the chance of visiting museums and galleries, historic cities, or towns featuring architecture considered interesting or unusual. They also rate "Self-Drive" very highly (32.7%), inasmuch as having a hire car at one's disposal allows for greater flexibility and mobility within the chosen tourist destination, or even the possibility of visiting several countries on the same trip, without having to depend on trains, coaches or organised tours. Taking into account the fact that a high percentage of South Africans travel as a family, this also means substantial savings in transport.

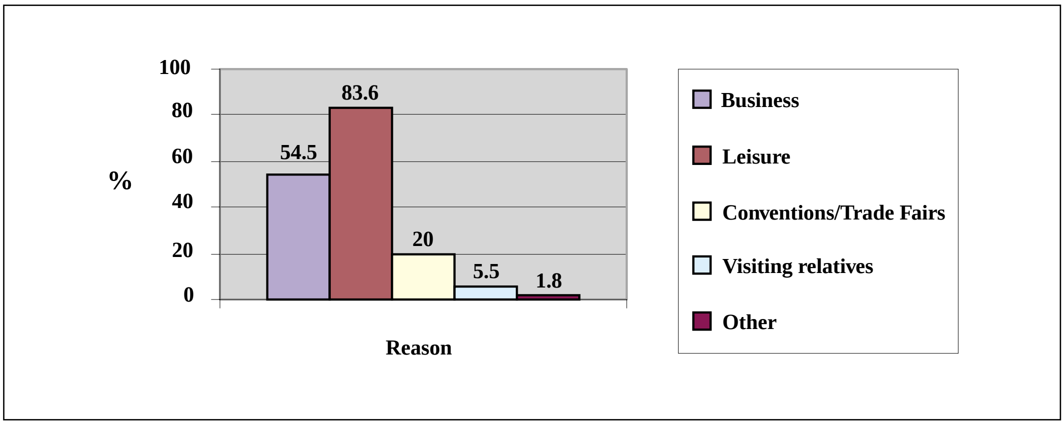
Type of Trip



Motivations for the trip

While the principal motivation underlying South Africans' interest in travelling abroad is to enjoy their holidays (83.6%), in many other cases they have to travel for business reasons (54.5%) or to attend conventions and trade fairs (20%). Around 5.5% use their vacations to visit family and friends.

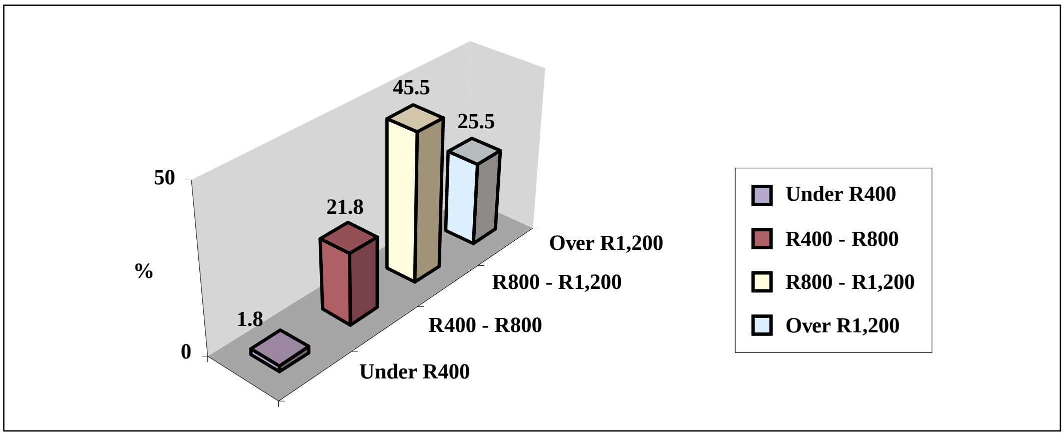
Reason for Travel



Holiday cost considerations

On the basis of questionnaires completed by South African tourists, the budget that such travellers have at their disposal to spend on their trips abroad is estimated, in descending order, as: R 800 – R 1,200 per person per day in 45.5% of cases; over R 1,200 per person per day in 25.5% of cases; and thirdly, R 400 – R 800 in 21.8% of cases.

Budget per Person per Day



4.2.10. Competing destinations

Short-haul international destinations

As pointed out above, the latest data published by Statistics South Africa for May 2000 report the predominant means of transport among South African residents leaving the country temporarily as being the car, accounting for 184,793 (62.9%) of a total of 293,616, followed by the aeroplane, with 108,052 (36.8%). Taking these figures into account plus that the fact that the countries bordering on South Africa are Namibia, Botswana, Zimbabwe, Mozambique, and the independent states of Lesotho and Swaziland, it would therefore appear that these countries, along with the Indian Ocean islands, are the short-haul tourist destinations competing with the rest of the market.

Among South African residents who left the country by air in May 2000 and duly completed the Departure Form 66,399 (61.5%), the main African destinations to which they were going were: Namibia 2,785 (4.2%), Mauritius 2,539 (3.8%), Zimbabwe 1,672 (2.5%), Mozambique 1,599, Botswana 1,288 and Zambia 1,034. This same report likewise indicated that South African residents travelling to Africa did so more for business (68%) than for leisure (28.2%)

The tourist appeal of all these countries lies in the beauty and uniqueness of their scenery and beaches, as well as their private game reserves, which tend to attract sports- and nature-lovers. A further factor to be taken into account is the reduction in travel costs: not only can South African tourists travel in their own cars but in view of the Rand’s weakness against European currencies, they can also obtain a more favourable rate of exchange vis-à-vis the currencies of neighbouring African countries.

New emerging vacation destinations

Information gathered from different sources reveals that leading tourist destinations for South Africans, such as Mauritius and the like, have witnessed a marked decline in recent years. On the other hand, while destinations such as the United Kingdom and the United States have successfully held their market share, other new tourist destinations have emerged, which are now attracting the attention of and starting to become popular with South Africans.

According to Finance Week, Ian Sandler, MD of Avis Tourism & Leisure, stated that the RCI Time Share group sent 40% more South Africans to Spain in 1998 than in preceding year. Australia, for its part, is increasing its share of the South African market, not merely because of its favourable rate of exchange, but also because South Africans identify with its climate, language and culture.

In addition, the Maldive Islands are gradually expected to become an alternative to Mauritius and Reunion, since the latter are growing ever more costly. A further two, increasingly popular destinations are the Mediterranean islands, specifically Malta and Ibiza. Malaysia and Thailand, with their beaches, luxury hotels and tropical climate, are also perceived by South Africans as destinations offering good value for money.

5. Annexes

5.1. USEFUL ADDRESSES

DEPARTMENT OF ENVIRONMENTAL AFFAIRS & TOURISM
Private Bag X447 - Pretoria 0001
Tel: 2712/ 310 36 60; Fax: 2712/ 322 92 31
Minister: Mr. Mohammed Valli Moosa

SATOUR (South African Tourism Board)
Private Bag X10012 - Sandton 2146
Tel: 2711/ 778 80 00; Fax: 2711/ 778 80 01
E-mail: satour@icon.co.za
President: Mr. Saki Macozoma

SATSA (South African Tourism Services Association)
PO Box 65924 - Benmore 2010
Tel: 2711/ 883 91 03; Fax: 2711/ 883 90 02
Web: www.satsa.com
Chief Executive Officer: Ms. Gail McCanns

ASATA (Association of South Africa Travel Agencies)
P O Box 31742 - Braamfontein 2017
Tel: 2711/ 484 05 80/05 94; Fax: 2711/ 484 08 28
Director General: Mr. Chris Du Toit

ANTOR (Association of National Tourism Offices in South Africa)
P O Box 782551 - Sandton 2146
Tel: 2711/ 784 67 08;Fax: 2711/ 784 64 42
President: Ms. Antoinette Lintvelt

5.2. ASATA RETAIL TRAVEL AGENCIES

AATB WOOLWORTHS TRAVEL (PTY) LTD
Tel: 021/ 462 10 80
Fax: 021/ 461 93 85
CAPE TOWN 8000
P O BOX 680
wwaatb@woolworths.co.za

AATB WORLD CHOICE
Tel: 021/ 425 64 30
Fax: 021/ 425 11 69
CAPE TOWN 8000
P O BOX 3808
leizele/aatb@galileosa.co.za

ADCOCK'S SURE TRAVEL
Tel: 033/ 345 25 35
Fax: 033/ 342 78 48
PIETERMARITZBURG
3200 P O BOX 1447
nealm.Adcockstravel@galileosa.co.za

AFROLYMPIC TRAVELS
Tel: 011/ 884 41 04
Fax: 011/ 880 31 61
PARKLANDS 2121
P O BOX 1264
mikelk@kwando.com

AI KAJEE
Tel: 031/ 306 15 15
Fax: 031/ 337 01 33
DURBAN 4000 P O BOX 1384
reception.aikajee@galileosa.co.za

AIRBORNE TRAVEL
Tel: 012/ 428 20 35
Fax: 021/ 347 09 03
WINGATE PARK 153
P O BOX 2087
antab.airbornetravel@galileosa.co.za

ALL TRAVEL SERVICE
Tel: 011/ 894 48 95
Fax: 011/ 918 10 72
DUNSWART 1508 P O BOX 6699
alltrav@global.co.za

ALL WAYS TRAVEL
Tel: 011/ 955 36 38
Fax: 011/ 955 37 62
PAARDEKRAAL 1752 P O BOX 246
miket.allways@galileosa.co.za

ALOE SURE TRAVEL
Tel: 043/ 726 53 27
Fax: 043/ 726 36 64
EAST LONDON 5200
P O BOX 541
lauretteh.aloevl@galileosa.co.za

AMERICAN EXPRESS TRAVEL
Tel: 035/ 789 13 26
Fax: 035/ 789 00 22
RICHARDS BAY 3900
P O BOX 327
leslie.calvert@amextravel.co.za

AMERICAN EXPRESS TRAVEL
Tel: 011/ 883 13 16
Fax: 011/ 783 01 77
SANDTON 2146 P O BOX 785534
bonniecripps@amextravel.co.za

AMERICAN EXPRESS TRAVEL
(BANKFORUM)
Tel: 012/ 322 26 20
Fax: 012/ 322 92 50
PRETORIA 1
P O BOX 3592

AMERICAN EXPRESS TRAVEL
(BRAAMPARK)
Tel: 011/ 359 03 49
Fax: 011/ 395 03 93
JOHANNESBURG 2000
P O BOX 1655
roland.bunge@amex.co.za

AMERICAN EXPRESS TRAVEL
(BROOKLYN)
Tel: 012/ 346 33 50
Fax: 012/ 346 33 50
WATERKLOOF 145
P O BOX 95440

AMERICAN EXPRESS TRAVEL
(CRESTA)
Tel: 011/ 476 11 19
Fax: 011/ 476 16 46
CRESTA CENTRE 2118
P O BOX 152
terry.powlesland@amextravel.co.za

AMERICAN EXPRESS TRAVEL
(DURBAN)
Tel: 011/ 301 55 41
Fax: 011/ 301 55 19
DURBAN 4000
P O BOX 2558
martin.yates@amextravel.co.za

AMERICAN EXPRESS TRAVEL
(HYDEPARK)
Tel: 011/ 325* 43 17
Fax: 011/ 325 49 36
CRAIGHALL 2024
P O BOX 41043
bev. Knott@amextravel.co.za

AMERICAN EXPRESS TRAVEL
(MIDRAND)
Tel: 011/ 315 83 30
Fax: 011/ 315 80 56
OLIFANTSFONTEIN 1665
P O BOX 401
enid.phillips@amextravel.co.za

AMERICAN EXPRESS TRAVEL (PE)
Tel: 041/ 408 97 00
Fax: 041/ 368 80 20
PORT ELIZABETH 6000
P O BOX 1271
tracy.mentzel@amex.co.za

AMERICAN EXPRESS TRAVEL
(THIBAULT)
Tel: 021/ 21 55 86
Fax: 021/ 25 35 30
ROGGEBAAI 8012
P O BOX 6761
terry.stone@amextravel.co.za

AMERICAN EXPRESS TRAVEL
(WESTVILLE)
Tel: 031/ 266 81 12
Fax: 031/ 86 53 06
DURBAN 4000
P O BOX 2923
amex.westville@amex.co.za

ANCHOR TRAVEL WORLDCHOICE
Tel: 031/ 916 37 73
Fax: 031/ 916 40 90
WINKELSPRUIT 4145
P O BOX 231
diannea.anchortravel@galileosa.co.za

ASIA TRAVEL
Tel: 011/ 615 68 86
Fax: 011/ 615 68 94
BRUMA 2026
P O BOX 696
flq@sinotech.co.za

ASSOCIATED TRAVEL SERVICES
Tel: 011/ 887 65 85
Fax: 011/ 887 68 73
HIGHLANDS NORTH 2037
P O BOX 377

ASTRA SURE TRAVEL
Tel: 051/ 447 63 52
Fax: 051/ 447 66 65
BLOEMFONTEIN 9300
P O BOX 8610
albertvz.astraho@galileosa.co.za

ASTRA TRAVEL (KIMBERLEY)
Tel: 053/ 832 12 91
Fax: 053/ 832 12 93
KIMBERLEY 8301
P O BOX 1567
hendrikh.astrakim@galileosa.co.za

ASTRA TRAVEL (KLERKSDORP)
Tel: 018/ 462 73 66
Fax: 018/ 462 73 34
KLERKSDORP 2750
P O BOX 621
marinag.astrakxe@galileosa.co.za

ASTRA TRAVEL (POTCHEFSTROOM)
Tel: 018/ 294 52 26
Fax: 018/ 294 60 32
POTCHEFSTROOM 2520
P O BOX 142
sheilam.ptchefstroomtrav@galileosa.co.za

ASTRAL TRAVEL WORLDCHOICE
Tel: 021/ 425 34 51
Fax: 021/ 425 34 71
GREEN POINT 8051
P O BOX 902
amandah.astral@galileosa.co.za

ATLAS TRAVEL
Tel: 021/ 424 34 17
Fax: 021/ 424 35 48
CAPE TOWN 8000
P O BOX 954
attravel@global.co.za

AVSCAN TRAVEL
Tel: 011/ 609 00 11
Fax: 011/ 452 98 10
EDENGLEN 1613
P O BOX 8905
ibickerstaff.avscan@za.amadeus.net

AZURE TRAVEL
Tel: 011/ 442 80 44
Fax: 011/ 442 86 62
CRAIGHALL 2024
P O BOX 411570
747trv@icon.co.za

BAFEBYL TRAVEL
Tel: 011/ 789 44 44
Fax: 011/ 787 94 49
SANDTON 2146
P O BOX 78241
bafenyi3.bafenyitravel@galileosa.co.za

BIRNAM TRAVEL
Tel: 011/ 887 20 62
Fax: 011/ 786 52 95
BIRNAM PARK 2015
PRIVATE BAG X1
ingridz.birnamtravel@galileosa.co.za

BLAKES TRAVEL (KRUGERSDORP)
Tel: 011/ 600 26 26
Fax: 011/ 660 17 66
KRUGERSDORP 1720
P O BOX 1525
roevr.blakes@galileosa.co.za

BLAKES TRAVEL AGENCY
Tel: 011/ 693 37 61
Fax: 011/ 693 37 65
RANDFONTEIN 1760
P O BOX 207
brianb.blakesrfr@galileosa.co.za

BOLAND SURE TRAVEL (PAARL)
Tel: 021/ 872 15 81
Fax: 021/ 872 94 94
CAPE TOWN 7620
P O BOX 364
ziana.bt@galileosa.co.za

BOLAND TOURS SURE TRAVEL
Tel: 023/ 342 3130
Fax: 023/ 347 1907
WORCESTER 6849
P O BOX 593
tourcon@galileosa.co.za

BREAKAWAY TRAVEL & TOURS
Tel: 011/ 884 41 52
Fax: 011/ 884 41 52
RIVONIA 2128
P O BOX 2416
bernicem.breakaway@galileosa.co.za

BUDGET TRAVEL &TOURS
Tel: 031/ 307 65 92
Fax: 031/ 307 65 99
DURBAN 4000
P O BOX 1216
thoppil@elton.lia.net

BURNS CUNNINGHAM
(BEDFORDVIEW)
Tel: 011/ 622 84 02
Fax: 011/ 622 52 66
BEDFORDVIEW
2008
P O BOX 565
bernicem@galileosa.co.za

BURNS CUNNINGHAM (CLEVELAND)
Tel: 011/ 629 11 13
Fax: 011/ 626 21 52
CLEVELAND 2022
P O BOX 40072
bernicom.burnscunningham@galileosa.co.za

CENTURION TRAVEL
Tel: 012/ 663 10 91
Fax: 012/ 663 45 52
CENTURION 46
P O BOX 7195
centrvl@iafrica.com

CIRCLE TRAVEL
Tel: 011/ 886 96 31
Fax: 011/ 789 54 80
RANDBERG 2125
P O BOX 2629
admin@plp.co.za

CLAUDIA'S TRAVEL
Tel: 011/ 325 50 92
Fax: 011/ 325 46 65
CRAIGHALL 2024 P O BOX 413077
claudia2.claudiac@galileosa.co.za

CLUB TRAVEL (CLAREMONT)
Tel: 021/ 683 45 79
Fax: 021/ 683 45 79
CAPE TOWN 8000 P O BOX 2055
tracyp@club-travel.co.za

CLUB TRAVEL (LOOP STREET)
Tel: 021/ 424 00 04
Fax: 021/ 424 72 72
CAPE TOWN 8000
P O BOX 2055
wally@club-travel.co.za

CLUB TRAVEL (ROSEBANK)
Tel: 011/ 442 32 00
Fax: 011/ 442 32 08
SAXONWOLD 2132
P O BOX 2439
jps@club-travel.co.za

CLUB TRAVEL (SEA POINT)
Tel: 021/ 439 90 62
Fax: 021/ 439 07 04
CAPE TOWN 8000
P O BOX 2055
christ.pherd@club-travel.co.za

CLUB TRAVEL (SOMERSET WEST)
Tel: 021/ 851 75 55
Fax: 021/ 851 75 18
CAPE TOWN 8000
P O BOX 2055
jof@club-travel.co.za

CLUB TRAVEL (TYGERVALLEY)
Tel: 021/ 919 94 20
Fax: 021/ 919 94 39
CAPE TOWN 8000
P O BOX 2055
lucindac@club-travel.co.za

COLUMBIA TRAVEL
Tel: 011/ 880 77 76
Fax: 021/ 442 84 97
PARKLANDS 2121
P O BOX 495
genec.columbiatravel@galileosa.co.za

COMPUTRAVEL
Tel: 011/ 885 10 08
Fax: 011/ 885 17 17
RANDBERG 2125
P O BOX 2980
mariettew@computravel.com

CONCORDE ETNIQUE TRAVEL
Tel: 051/ 436 59 30
Fax: 051/ 436 60 73
NOORDSTAD 9305
P O BOX 13600
nerinas.etnique@galileosa.co.za

CONCORDE STYLE LIFE TRAVEL
Tel: 031/ 700 84 47
Fax: 031/ 700 84 54
ASHWOOD 3605
P O BOX 10125
sharonw.stylelife@galileosa.co.za

CONCORDE TRAVEL (BELLVILLE)
Tel: 021/ 946 11 37
Fax: 021/ 949 98 79
BELLVILLE 7535
P O BOX 1983
gerdavs.concb@galileosa.co.za

CONCORDE TRAVEL (BEDFORDVIEW)
Tel: 011/ 622 29 34
Fax: 011/ 622 14 77
GARDENVIEW 2047
P O BOX 75123
naruan.concb@galileosa.co.za

CONCORDE TRAVEL (LENASIA)
Tel: 011/ 854 46 13
Fax: 011/ 854 45 49
LENASIA 1820
P O BOX 757
mohamedr.concl@galileosa.co.za

CONCORDE TRAVEL (PIETERSBURG)
Tel: 015/ 291 21 77
015/ 295 83 59
PIETERSBERG 700
P O BOX 827
jennyr.concordeptg@galileosa.co.za

CONCORDE TRAVEL ASSOCIATE
Tel: 041/ 398 20 00
Fax: 041/ 398 20 16
NEWTON PARK PORT 6055
P O BOX 7820
michelen.contravpe@galileosa.co.za

CONCORDE TRAVEL (CAPE TOWN)
Tel: 021/ 419 99 60
Fax: 021/ 425 25 05
CAPE TOWN 8000
P O BOX 4291
antjeg.concct@galileosa.co.za

CONCORDE TRAVEL (DURBAN)
Tel: 031/ 304 51 04
Fax: 031/ 304 52 12
DURBAN 4000
P O BOX 988
suek.concd@galileosa.co.za

CONCORDE TRAVEL (ILLOVO)
Tel: 011/ 880 82 41
Fax: 011/ 880 88 55
JOHANNESBURG 2000
P O BOX 6988
lauran.concordeillovo@galileosa.co.za

CONCORDE TRAVEL (KILLARNEY)
Tel: 011/ 486 18 50
Fax: 011/ 486 18 77
HOUGHTON 2041
P O BOX 1708

CONCORDE TRAVEL (PARKTOWN)
Tel: 011/ 484 38 71
Fax: 011/ 484 06 32
JOHANNESBURG 2000
P O BOX 5027
avrylg.conc@galileosa.co.za

CONCORDE TRAVEL (PRETORIA)
Tel: 012/ 326 39 93
Fax: 012/ 326 50 74
ARCADIA 7
P O BOX 55640
careng.conc@galileosa.co.za

CONCORDE TRAVEL TODAY
Tel: 011/ 755 21 46
Fax: 031/ 755 42 98
NELSPRUIT 1200
P O BOX 3444
jantn.travelt@galileosa.co.za

CONCORDE TRAVELAD TRAVEL
Tel: 03341/ 321 11
Fax: 03341/ 321 11
GREYTOWN 3250
P O BOX 500
lisab.travelad@galileosa.co.za

CONNEX CORPORATE TRAVEL SERVICES
Tel: 021/ 914 63 99
Fax: 021/ 914 14 69
TYGER PARK 7536
P O BOX 3011
vanyal@connex.co.za

CONNEX TRAVEL (CAPE TOWN)
Tel: 021/ 462 41 03
Fax: 021/ 462 41 02
CAPE TOWN 8000
P O BOX 1302
sharonn@connex.co.za

CONNEX TRAVEL (DURBAN)
Tel: 031/ 307 27 01
Fax: 031/ 307 37 73
DURBAN 4000
P O BOX 1543
arthurw@connex.co.za

CONNEX TRAVEL(PARKTOWN)
Tel: 011/ 488 82 56
Fax: 011/ 488 82 74
JOHANNESBURG 2000
P O BOX 113
sydneyg@connex.co.za

CONNEX TRAVEL (PRETORIA)
Tel: 012/ 315 29 28
Fax: 012/ 325 73 44
PRETORIA 1
P O BOX 821
santiev@connex.co.za

CROWN TRAVEL
Tel: 011/ 622 93 33
Fax: 011/ 622 62 27
BRUMA 2026
P O BOX 6761
eddies@crowntravel.co.za

CUMMING TRAVEL SERVICES
Tel: 011/ 788 06 00
Fax: 011/ 880 34 93
JOHANNESBURG 2000
P O BOX 9447
cumming@yebo.co.za

D'AMANTE TRAVEL & TOURS
Tel: 011/ 728 58 11
Fax: 011/ 483 29 49
FELLSIDE 2192
143 L BOTHA AVE
vieabela@cis.co.za

DANTE TRAVEL SERVICES
Tel: 021/ 511 64 57
Fax: 021/ 551 66 62
MILNERTON 7435
P O BOX 659
dante@iafrica.com

DELTA INTERNATIONAL TRAVEL
Tel: 011/ 465 86 60
Fax: 011/ 465 86 69
FOURWAYS 2055
P O BOX 2524
briank.delta@galileosa.co.za

DESTINATIONS TRAVEL
Tel: 033/ 342 37 72
Fax: 033/ 342 14 59
PIETERMARITZBURG 3200
P O BOX 1597
louises.destinations@galileosa.co.za

DYNAMIC SURE TRAVEL (EASTGATE)
Tel: 011/ 622 38 40
Fax: 011/ 622 15 73
BEDFORDVIEW 2008
P O BOX 1303
angelam.dynamic@galileosa.co.za

DYNAMIC SURE TRAVEL (SHOP L36)
Tel: 011/ 622 00 17
Fax: 011/ 622 03 06
BEDFORDVIEW 2008
P O BOX 1303
cynamic2.dynamic@galileosa.co.za

E-TRAVEL
Tel: 011/ 880 88 00
Fax: 011/ 880 81 80
CRAIGHALL 2024
P O BOX 413143
christinep@etravel.co.za

EMBASSY SURE TRAVEL
Tel: 021/ 424 11 11
Fax: 021/ 424 11 66
CAPE TOWN 8000
P O BOX 84
iss@global.co.za

EPCOT TRAVEL
Tel: 011/ 744 36 13
Fax: 011/ 740 26 68
BRAKPAN 1540
P O BOX 1384
michalej.epcottravel@galileosa.co.za

EQUUS TRAVEL
Tel: 021/ 982 21 70
Fax: 021/ 982 21 21
BRAKENFELL 7560
P O BOX 494
mari-jean.equustrv@galileosa.co.za

ERM TRAVEL (BFN)
Tel: 051/ 448 46 29
Fax: 051/ 448 40 06
BLOEMFONTEIN 9300
P O BOX 8440
petriev.ermtravel@galileosa.co.za

ERM TRAVEL (CAPE)
Tel: 021/ 421 43 35
Fax: 021/ 421 74 44
ROGGEBAAI 8012
P O BOX 6737
sarag.ermtravel@galileosa.co.za

ERM TRAVEL (DURBAN)
Tel: 031/ 307 26 44
Fax: 031/ 307 26 05
DURBAN 4000
P O BOX 377
simid.erm@galileosa.co.za

ERM TRAVEL (SANDTON)
Tel: 011/ 884 43 43
Fax: 011/ 884 90 08
RIVONIA 2128
P O BOX 6099
terry@ermtours.co.za

EURO EXPRESS TRAVEL
Tel: 011/ 788 16 54
Fax: 011/ 880 49 28
SAXONWOLD 2132
P O BOX 52277
safaris@iafrica.com

EXECUTIVE TRAVEL
Tel: 011/ 788 20 50
Fax: 011/ 880 12 60
PARKLANDS 2121
P O BOX 1798
executive8.executive@galileosa.co.za

EXPRESS TRAVEL
Tel: 011/ 814 81 22
Fax: 011/ 814 12 16
NIGEL 1490
P O BOX 618

FIRST TR MANAGEMENT
INTERNATIONAL
Tel: 011/ 787 77 67
Fax: 011/ 787 77 61
PARKLANDS 2121
P O BOX 2443
dieterr@firsttravel@galileosa.co.za

FISH HOEK SURE TRAVEL
Tel: 021/ 782 11 48
Fax: 021/ 782 57 40
FISH HOEK 7974
P O BOX 22203
jonathans@cybertrade.co.za

FLYWELL SURE TRAVEL (PRETORIA)
Tel: 012/ 374 20 41
Fax: 012/ 374 05 10
PRETORIA 1
P O BOX 3676

FLYWELL SURE TRAVEL (WYNBERG)
Tel: 021/ 761 50 44
Fax: 021/ 797 21 10
CAPE TOWN 8000
P O BOX 4719
flywellcpt@galileosa.co.za

FLYWELL TRAVEL (DURBAN)
Tel: 031/ 303 33 30
Fax: 031/ 303 33 66
DURBAN 4000
P O BOX 2476
lorie.flywell@galileosa.co.za

FLYWELL TRAVEL (JHB)
Tel: 011/ 834 48 61
Fax: 011/ 491 11 03
JOHANNESBURG 2000
P O BOX 1456
shashin.flywellinb@galileosa.co.za

FORESHORE SURE TRAVEL
Tel: 021/ 421 75 07
Fax: 021/ 41916 80
CAPE TOWN 8000
P O BOX 1979
sydneyo.foreshoretravel@galileosa.co.za

FRIENDS OF THE LION (CAPE TOWN)
Tel: 021/ 419 60 75
Fax: 021/ 419 23 26
CAPE TOWN 8000
P O BOX 7168
cathyj.lionworld@galileosa.co.za

G & G TRAVEL
Tel: 011/ 883 29 16
Fax: 011/ 883 29 19
LYNDHURST 2106
P O BOX 890135
g&gtravel@galileosa.co.za

GATEWAY TRAVEL
Tel: 011/ 626 33 50
Fax: 011/ 626 26 86
CLEVELAND 2022
P O BOX 401047
gateway@galileosa.co.za

GAZELLE TRAVEL
Tel: 012/ 342 81 70
Fax: 012/ 342 81 74
PRETORIA 1
P O BOX 4149
adreb.gazelle@galileosa.co.za

GBS SURE TRAVEL
Tel: 046/ 622 22 35
Fax: 046/ 622 39 82
GRAHAMSTOWN 6040
P O BOX 124
marianl.gbstravel@galileosa.co.za

GBS SURE TRAVEL (PORT ELIZABETH)
Tel: 046/ 624 40 44
Fax: 046/ 624 45 27
PORT ELIZABETH 6170
P O BOX 3808
marie.gbsport@galileosa.co.za

GOERGE RENNIE TRAVEL
Tel: 011/ 422 45 60
Fax: 011/ 422 43 55
BENONI 1500
P O BOX 285
georgerennies1.georenie@galileosa.co.za

GLENWOOD TRAVEL
Tel: 012/ 348 81 31
Fax: 012/ 348 12 57
MENLO PARK 102
P O BOX 36058

GLOBAL EXCELLENCE
Tel: 016/ 981 70 00
Fax: 016/ 981 70 01
VANDERBIJLPARK 1900
P O BOX 4877
lindiw@worldspan.co.za

GOLD SURE TRAVEL
Tel: 021/ 419 97 10
Fax: 021/ 418 37 27
CAPE TOWN 8000
P O BOX 3152
yvonneh.goldtravel@galileosa.co.za

GOPHER SURE TRAVEL
Tel: 021/ 685 40 40
Fax: 021/ 685 54 09
CAPE TOWN 8000
P O BOX 5303
gopher1.gopher@galileosa.co.za

GRAYSTON TRAVEL (13TH FLOOR)
Tel: 011/ 622 58 38
Fax: 011/ 622 85 47
BEDFORDVIEW 2058
P O BOX 75548
lee.grayston@galileosa.co.za

GRAYSTON TRAVEL (U26A)
Tel: 011/ 622 58 37
Fax: 011/ 622 58 47
BEDFORDVIEW 2047
P O BOX 75548

GREAT ESCAPE
Tel: 011/ 22 40 27
Fax: 031/ 21 81 52
MUSGRAVE ROAD 4062
P O BOX 51246
banuk.get@galileosa.co.za

GULLIVERS TRAVELS (BRUMA)
Tel: 011/ 346 20 00
Fax: 011/ 346 20 20
HIGHLANDS NORTH 2037
P O BOX 1507
gullivers.travels@galileosa.co.za

HARVEY WORLD (HUMANSDORP)
Tel: 0422/ 95 18 08
Fax: 0422/ 95 16 80
HUMANSDORP 6300
P O BOX 390
chrstelp.hwthumansdorp@galileosa.co.za

HARVEY WORLD (JEFFREYSBAY)
Tel: 0423/ 293 27 53
Fax: 0423/ 293 27 92
JEFFREYSBAY 6330
24 DIAZ STREET
elmarie.mulder@harveyworld.co.za

HARVEY WORLD DE VUYST TRAVEL
Tel: 021/ 92 80 38
Fax: 021/ 92 80 89
BELLVILLE 7535
P O BOX 223
maried.devuystparow@galileosa.co.za

HARVEY WORLD DE VUYST TRAVEL
Tel: 021/ 975 32 02
Fax: 021/ 975 32 12
BELLVILLE 7535
P O BOX 223
devuyst2.devuystdville@galileosa.co.za

HARVEY WORLD EDUSPORT TRAVEL
Tel: 031/ 303 43 40
Fax: 031/ 303 43 50
MUSGRAVE ROAD 4062
P O BOX 50821
bronwyn.tongley@harveyword.co.za

HARVEY WORLD MARATHON TRAVEL
Tel: 031/ 304 49 94
Fax: 031/ 304 48 95
DURBAN 4000
P O BOX 1651
yunuso.marathon@galileosa.co.za

HARVEY WORLD SHIRALEE TRAVEL
Tel: 028/ 313 05 26
Fax: 028/ 312 45 07
HERMANUS 7200
P O BOX 1420
eleanor.vanzyl@harveyworld.co.za

HARVEY WORLD TR RENNIES
(EASTGATE)
Tel: 011/ 616 12 41
Fax: 011/ 616 30 01
GARDENVIEW 2047
P O BOX 75320
colleen.simpson@travel.rennies.co.za

HARVEY WORLD TR RENNIES
(SANDTON)
Tel: 011/ 833 85 21
Fax: 011/ 883 12 42
SANDTON 2146 P O BOX 784206
chantel.suttie@travel.rennies.co.za

HARVEY WORLD TRAVEL
Tel: 03931/ 726 24
Fax: 03931/ 726 28
MARGATE 4275
P O BOX 723
sueh.csct@galileosa.co.za

HARVEY WORLD TRAVEL
(AUCKLAND PARK)
Tel: 011/ 482 69 27
Fax: 011/ 482 69 27
BRAAMFONTEIN 2017
P O BOX 32972
jacques.tribelhorn@harveyworld.co.za

HARVEY WORLD TRAVEL
(GROENKLOOF)
Tel: 012/ 346 64 04
Fax: 012/ 346 64 20
GROENKLOOF 27
P O BOX 2059
management@harveyworld.co.za

HARVEY WORLD TRAVEL
(HILLCREST)
Tel: 011/ 765 57 12
Fax: 031/ 765 58 45
HILLCREST 3600
P O BOX 2232
kelvin.caldwell@harveyworld.co.za

HARVEY WORLD TRAVEL
(NELSPRUIT)
Tel: 013/ 752 83 71
Fax: 013/ 752 61 00
NELSPRUIT 1200
P O BOX 542
linda.glyncuthbert@harveyworld.co.za

HARVEY WORLD TRAVEL
(PAARL)
Tel: 021/ 872 19 94
Fax: 021/ 872 56 50
PAARL 7646
43 LADY GREY STR
corieta.burger@harveyworld.co.za

HARVEY WORLD TRAVEL
(RANDBERG)
Tel: 011/ 789 15 30
Fax: 011/ 787 03 14
RANDBURG 2125
P O BOX 3539
diane.duplooy@harveyworld.co.za

HARVEY WORLD TRAVEL FORCE
Tel: 011/ 455 59 10
Fax: 011/ 455 62 93
BEDFORDVIEW 2008
P O BOX 1130
desireeschwabe@harveyworld.co.za

HARVEY WORLD TRAVEL KLOOF
Tel: 031/ 764 08 30
Fax: 031/ 764 04 88
HILLCREST 3650
P O BOX 2232
val.caldwell@harveyworld.co.za

HARVEY WORLD TRAVEL KNYSNA
Tel: 044/ 382 54 34
Fax: 044/ 382 54 25
KNYSNA 6570
P O BOX 444
louise.yoko@harveyworld.co.za

HARVEY WORLD TRAVEL RENNIES
Tel: 041/ 368 49 35
Fax: 041/ 368 49 43
WALMER 6065 P O BOX 5894
jenny.barnard@travel.rennies.co.za

HARVEY WORLD TRAVEL
RONDEBOSCH
Tel: 021/ 671 37 11
Fax: 021/ 683 68 61
CAPE TOWN 8000
P O BOX 651
paml.transit@galileosa.co.za

HARVEY WORLD TRAVEL
WESTVILLE
Tel: 031/ 266 13 75
Fax: 031/ 266 42 40
WANDSBECK 3631
P O BOX 1085
helend.westvilletravel@galileosa.co.za

HIGH CONSTANTIA WORLDCHOICE
(CONST)
Tel: 021/ 794 72 39
Fax: 021/ 794 33 99
CONSTANTIA 7848
P O BOX 300
karenm.hct@galileosa.co.za

HIGH CONSTANTIA WORLDCHOICE
(HOUTBAY)
Tel: 021/ 790 74 03
Fax: 021/ 790 54 03
CONSTANTIA 7848
P O BOX 300
janeh.hct@galileosa.co.za

HIGH CONSTANTIA WORLDCHOICE
(SOMERSET)
Tel: 021/ 852 20 58
Fax: 021/ 852 75 50
SOMERSET WEST 7129
P O BOX 440
shirleyw.hct@galileosa.co.za

HILLBROW TRAVEL
Tel: 011/ 483 20 02
Fax: 011/ 483 38 30
ORANGE GROVE 2119
P O BOX 46404
elvios.hillbrowtravel@galileosa.co.za

HOLIDAY TRAVEL (RANDBURG)
Tel: 011/ 298 81 70
Fax: 011/ 886 53 54
RANDBURG 2125
P O BOX 4651
nadine@holidaytravel.co.za

HOWICK TRAVEL
Tel: 033/ 330 21 93
Fax: 033/ 330 38 08
HOWICK 3290
P O BOX 248
stan.mary@pixie.co.za

HOWICK TRAVEL (HILTON)
Tel: 0331/ 43 13 70
Fax: 0331/ 43 39 52
HOWICK 3290
P O BOX 248
rolandh.howicktravel@galileosa.co.za

HUISGENOOT/YOU/DRUM
REISKLUB/TRAVEL CLUB
Tel: 011/ 783 73 98
Fax: 011/ 783 74 15
BENMORE 2010
P O BOX 653280
megasite@mweb.co.za

HYLTON ROSS TOURS & HOLIDAYS
Tel: 021/ 438 15 00
Fax: 021/ 438 29 19
CAMPS BAY 8040
P O BOX 32154
ettiennem.hyltonross@galileosa.co.za

IMPACT INCENTIVES
Tel: 011/ 886 96 88
Fax: 011/ 886 97 01
RANDBURG 2125
P O BOX 4002
simoneds@impact-incentives.co.za

IMPACT TRAVEL & TOURS
Tel: 011/ 953 45 55
Fax: 011/ 953 49 04
KRUGERSDORP 1740
P O BOX 2277
SARBOT@worldonline.co.za

INDO JET SURE TRAVEL (CAPE TOWN)
Tel: 021/ 421 66 30
Fax: 021/ 425 27 42
CAPE TOWN 8000
P O BOX 1002
annabelles.indojettravel@galileosa.co.za

INTERCAPE TEAVEL & TOURS
Tel: 021/ 419 88 88
Fax: 021/ 419 08 37
CAPE TOWN 8000
P O BOX 3197
kathyde.intercape@galileosa.co.za

INTERLINK WORLD TRAVEL
Tel: 011/ 487 34 20
Fax: 011/ 487 10 99
YOEVILLE 2143
P O BOX 94054
wolman@iafrica.co.za

INTERNATIONAL TRAVELS 1980
Tel: 011/ 447 83 00
Fax: 011/ 447 68 18
PARKLANDS 2121
P O BOX 3088
miltonm.internltrvl@galileosa.co.za

INTERTRANS TRAVEL BUREAU
Tel: 012/ 320 85 91
Fax: 012/ 320 85 99
PRETORIA 1
P O BOX 3292
katy@worldspan.co.za

ITC SURE TRAVEL SERVICE (FEDLIFE)
Tel: 021/ 419 00 50
Fax: 021/ 419 00 65
CAPE TOWN 8000
P O BOX 2772
estellea.itctravel@galileosa.co.za

JET INTERNATIONAL TRAVEL (DURBAN)
Tel: 011/ 301 12 25
Fax: 031/ 304 92 00
DURBAN 4000
P O BOX 3565
tammyf.jetinternational@galileosa.co.za

JET TRAVEL (PE)
Tel: 041/ 373 78 58
Fax: 041/ 373 22 27
PORT ELIZABETH 6000
P O BOX 1341
trishd.jettravel@galileosa.co.za

KENILWORTH TRAVEL
Tel: 021/ 761 71 58
Fax: 021/ 797 23 18
CAPE TOWN 8000
P O BOX 5259
harolde.ktravel@galileosa.co.za

KEVALTRAVEL (KOKSTAD)
Tel: 037/ 727 31 24
Fax: 037/ 727 39 39
KOKSTAD 4700
P O BOX 388
wendyr.kevaltravel@galileosa.co.za

KUDU TRAVELS
Tel: 015/ 295 64 83
Fax: 015/ 295 85 22
PIETERSBERG 700
P O BOX 988
bebek.kudu@galileosa.co.za

LET'S TRAVEL WORLDCHOICE
Tel: 0437/ 34 29 83
Fax: 0437/ 43 33 70
EAST LONDON 5200
P O BOX 7337
debbie.letstravel@galileosa.co.za

LIBTRAVEL SERVICE
Tel: 011/ 408 23 34
Fax: 011/ 408 34 32
JOHANNESBURG 2000
P O BOX 10499
chris.bakker@mail.liberty.co.za

LINKSURE TRAVEL
Tel: 021/ 674 31 60
Fax: 021/ 674 31 64
CLAREMONT 7735
P O BOX 421
davidb.linktravel@galileosa.co.za

LION WORLD TRAVEL
Tel: 011/ 486 20 00
Fax: 011/ 486 20 20
CRAIGHALL 2024
P O BOX 413713
lwt.lionworld@galileosa.co.za

LLOYDS TRAVEL
Tel: 011/ 706 1357
Fax: 011/ 706 13 88
BRYANSTON 2021
P O BOX 130539
innap.lloydstrvl@galileosa.co.za

LOWVELD TRAVEL AGENCY
Tel: 011/ 752 81 83
Fax: 011/ 752 61 76
NELSPRUIT 1200
P O BOX 1936
cherylvd.lowveldtravel@galileosa.co.za

LUSIBA TRAVEL SERVICES
Tel: 011/ 463 77 23
Fax: 011/ 463 78 78
BRYANSTON 2021
P O BOX 71517
lusiba.itc@etravel.co.za

LUSOGLOBO TRAVEL AGENCY
Tel: 011/ 622 78 18
Fax: 011/ 622 13 82
BRUMA 2026
P O BOX 1610
analitam.lusoglobotravel@galileosa.co.za

MAGIC TRAVEL (BROOKLYN)
Tel: 012/ 346 22 39
Fax: 012/ 346 23 27
ARCADIA 7
P O BOX 55506
meganf.magictravel@galileosa.co.za

MAGIC TRAVEL (FOURWAYS)
Tel: 011/ 465 84 85
Fax: 011/ 465 84 80
BRYANSTON 2021
P O BOX 67600
oeonl.magictravel@galileosa.co.za

MAGIC TRAVEL (MENLYN)
Tel: 012/ 348 25 22
Fax: 012/ 348 26 01
MENLO PARK 102
P O BOX 36070
paulae.magictravel@galileosa.co.za

MAKRO TRAVEL CAPE
Tel: 021/ 910 05 44
Fax: 021/ 910 05 93
TYGERVALLEY 7536
P O BOX 3502
marynm.makrotrv@galileosa.co.za

MAKRO TRAVEL/PILGRIMAGE TOURS
Tel: 011/ 476 18 20
Fax: 011/ 476 90 90
CRESTA CENTRE 2118
P O BOX 2896
marynm.makrotrv@galileosa.co.za

MANN SURE TRAVEL
Tel: 058/ 303 45 98
Fax: 058/ 303 22 58
BETHLEHEM 9700
P O BOX 114
josiem.manntravel@galileosa.co.za

MARITIME SURE TRAVEL (PLZ)
Tel: 041/ 484 55 40
Fax: 041/ 487 28 03
PORT ELIZABETH 6056
P BAG X 2766
marisure@iafrica.com

MARITIME SURE TRAVEL
(UITENHAGE)
Tel: 041/ 922 91 14
Fax: 041/ 992 50 59
UITENHAGE 6230 P O BOX 1153
kaysiep.maritime@galileosa.co.za

MATIES INDO JET SURE TRAVEL
Tel: 021/ 99 69 03
Fax: 021/ 99 73 73
TYGERVALLEY 7536
P O BOX 3359
dannul.maties@galileosa.co.za

MATIES INDO JET SURE TRAVEL
(BELLVILLE)
Tel: 021/ 914 50 20
Fax: 021/ 914 50 30
TYGERVALLEY 7536
P O BOX 4175
maureend.indojettravel@glileosa.co.za

MATIES SURE TRAVEL
(STELLENBOSCH)
Tel: 021/ 887 11 36
Fax: 021/ 887 46 24
STELLENBOSCH 7600
P O BOX 705
arrievdm.maties@galileosa.co.za

MATIES SURE TRAVEL (STRAND)
Tel: 024/ 53 11 20
Fax: 024/ 853 83 73
STRAND 7140
P O BOX 95
ronelbl.maties@galileosa.co.za

MEDTRAVEL
Tel: 031/ 360 77 11
Fax: 031/ 360 71 90
MARINE PARADISE 4056
P O BOX 10687
aleci.medtour@galileosa.co.za

MELVILLE TRAVEL
Tel: 011/ 726 71 66
Fax: 011/ 726 74 85
MELVILLE 2109
P O BOX 29325
lorenn.melvilletravel@galileosa.co.za

MICHELLE'S SURE TRAVEL
Tel: 011/ 913 32 90
Fax: 011/ 913 13 93
BOKSBURG 1460
P O BOX 677
jackievdw.michellestravel@galileosa.co.za

MILLENIUM TRAVEL
Tel: 021/ 930 62 27
Fax: 021/ 930 62 38
PAROW EAST 7501
P O BOX 6221
lindab.millennium@galileosa.co.za

MILLS SURE TRAVEL
Tel: 011/ 315 12 54
Fax: 011/ 315 22 99
HALFWAY HOUSE 1685
P O BOX 1965
celestem.millstravel@galileosa.co.za

MILLWAY SURE TRAVEL
(CLAREMONT)
Tel: 021/ 61 50 30
Fax: 021/ 61 77 00
CLAREMONT 7335
P O BOX 23403
wendyd.millway@galileosa.co.za

MILLWAY SURE TRAVEL (MOWBRAY)
Tel: 021/ 685 40 35
Fax: 021/ 685 44 52
MOWBRAY 7705
P O BOX 13048
derrickc.millway@galileosa.co.za

MILUCHA TRAVEL
Tel: 011/ 917 3561
Fax: 011/ 892 5133
BOKSBURG 1460
P O BOX 1060
anabelam.mta@galileosa.co.za

MK BOBBY NAIDOO TRAVEL
Tel: 0331/ 94 84 06
Fax: 0331/ 45 83 28
CUMBERWOOD 3235
P O BOX 8596
anushab.mkbn@galileosa.co.za

MK BOBBY NAIDOO TRAVEL (DBN)
Tel: 031/ 309 47 10
Fax: 031/ 309 36 28
DURBAN 4000
P O BOX 2878
mkbobby@iafrica.com

MOMENTUM TRAVEL WORLDCHOICE
Tel: 021/ 419 70 11
Fax: 021/ 421 48 19
CAPE TOWN 8000
P O BOX 5579
larry.momentum@galileosa.co.za

MOSSELBAY SURE TRAVEL
Tel: 0446/ 91 25 46
Fax: 0446/ 91 19 77
MOSSELBAY 6500
P O BOX 1582
ys.mslbaytvl@galileosa.co.za

NANTAI TRAVEL
Tel: 011/ 880 85 85
Fax: 011/ 95 09
SAXONWOLD 2132
P O BOX 1633
nantaitv@global.co.za

NASH TRAVEL KROONSTAD
Tel: 056/ 212 32 49
Fax: 056/ 212 32 60
KROONSTAD 9500
P O BOX 949
michlledw.nashtravel@galileosa.co.za

NETWORK TRAVEL
Tel: 011/ 622 66 90
Fax: 011/ 622 66 93
LYNDHURST 2106
P O BOX 89784
woodn.network@galileosa.co.za

NON-STOP TRAVEL
Tel: 031/ 562 94 11
Fax: 031/ 562 94 03
UMHLANGA ROCKS 4320
P O BOX 1261
tonyb.nonstoptravel@galileosa.co.za

NORMAN BEESON TRAVEL
Tel: 031/ 573 18 80
Fax: 031/ 573 18 90
REDHILL 4071
P O BOX 40430
veronicad.normanbeeson@galileosa.co.za

OCEANAIR SURE TRAVEL
(ROGGEBAAI)
Tel: 021/ 421 53 30
Fax: 021/ 425 32 39
ROGGEBAAI 8012 P O BOX 6569
carolb.oceanair@galileosa.co.za

OCEANAIR TRAVEL
(BRAAMFONTEIN)
Tel: 011/ 339 45 31
Fax: 011/ 339 45 39
BRAAMFONTEIN 2017
P BAG X 12
lizb.oceanair@galileosa.co.za

OCEANAIR TRAVE (DBN)
Tel: 031/ 305 23 51
Fax: 031/ 304 06 79
DURBAN 4000 P O BOX 5422
phyllish.oceanair@galileosa.co.za

OUTENIQUA SURE
Tel: 0448/ 74 61 94
Fax: 0443/ 74 61 47
GEORGE 6530
P O BOX 931
gaila.outeniquatravel@galileosa.co.za

OVERSEAS VISITORS CLUB (LONG
STR)
Tel: 021/ 423 44 77
Fax: 021/ 423 48 70
VLAEBERG 8018 P O BOX 15276
hroo@ovc.co.za

PAARL TRAVEL
Tel: 021/ 871 15 43
Fax: 021/ 872 34 99
PAARL 7620
P O BOX 3157
sandrab.paarltravel@galileosa.co.za

PAN AFRICAN TRAVEL AGENCY
Tel: 011/ 331 29 11
Fax: 011/ 331 26 48
JOHANNESBURG 2000
P O BOX 6287
johannat.panafrican@galileosa.co.za

PARAMOUNT TRAVEL
Tel: 021/ 439 66 60
Fax: 021/ 439 67 77
VLAEBERG 8018
P O BOX 16345
gills.paramount@galileosa.co.za

PARK TOURS (NEWCASTLE)
Tel: 03431/ 260 06
Fax: 03431/ 240 86
NEWCASTLE 2940
P O BOX 957
yvonnel.parktours@galileosa.co.za

PARK TOURS (SASOLBURG)
Tel: 016/ 76 05 20
Fax: 016/ 76 05 22
SASOLBURG 9570
P O BOX 2416
charmainef.parksasol@galileosa.co.za

PARK TOURS (V/DBIJLPARK)
Tel: 0169/ 31 17 20
Fax: 0169/ 81 59 02
VANDERBIJLPARK 1900
P O BOX 2691
parktravel.parkvdb@galileosa.co.za

PATHFINDERS TRAVEL
Tel: 011/ 453 11 13
Fax: 011/ 453 14 83
SENDERWOOD 2145
P O BOX 79684
bchard.pathfind@za.amadeus.net

PEGASUS TRAVELS
Tel: 011/ 825 15 10
Fax: 011/ 873 43 85
GERMISTON 1400
P O BOX 583
markb.pegasus@galileosa.co.za

PENINSULA TRAVEL
Tel: 021/ 782 11 38
Fax: 021/ 782 69 81
FISH HOEK 7975
P O BOX 22201
pencon@netactive.co.za

PENTA REISAGENTE
Tel: 01361/ 718 00
Fax: 01361/ 718 30
BETHAL 2310
P O BOX 301

PENTRAVEL (BROOKLYN)
Tel: 012/ 346 52 96
Fax: 012/ 346 47 75
GROENKLOOF 27
P O BOX 2053

PENTRAVEL (CRESTA)
Tel: 011/ 476 14 35
Fax: 011/ 476 20 00
CRESTA CENTRE 2118
P O BOX 3594
gillianp@pentravel.co.za

PENTRAVEL (EASTGATE)
Tel: 011/ 620 62 60
Fax: 011/ 622 68 48
BEDFORDVIEW 2008
P BAG X 56
kimw@pentravel.co.za

PENTRAVEL (HOWICK)
Tel: 033/ 305 34 44
Fax: 033/ 305 98 55
HOWICK 3290
P O BOX 5+6
nicky@pentravel.co.za

PENTRAVEL (KLOOF)
Tel: 011/ 764 99 00
Fax: 031/ 764 64 95
KLOOF 3610
P O BOX 756
lynette@pentravel.co.za

PENTRAVEL (MIDLANDS)
Tel: 033/ 394 69 61
Fax: 033/ 342 78 35
PIETERMARITZBURG 3200
P O BOX 2454
janee@pantravel.co.za

PENTRAVEL (MUSGRAVE)
Tel: 011/ 203 13 50
Fax: 031/ 202 73 09
MUSGRAVE ROAD 4062
P O BOX 50233
karenj@pentravel.co.za

PENTRAVEL (PAVILION)
Tel: 011/ 275 80 00
Fax: 031/ 265 13 77
PAVILLION 3611
P O BOX 1936
jane.bowden@pentravel.co.za

PENTRAVEL (PE)
Tel: 041/ 368 61 51
Fax: 041/ 368 61 51
WALMER 6065
P O BOX 5491
susana@pentravel.co.za

PENTRAVEL (SANDTON)
Tel: 011/ 305 72 80
Fax: 011/ 78364 10
RIVONIA 2128
P O BOX 4771
laurena@pentravel.co.za

PENTRAVEL (TYGERVALLEY
Tel: 021/ 914 59 20
Fax: 021/ 914 59 20
TYGERVALLEY 7536
P O BOX 3301
leighm@pentravel.co.za

PENTRAVEL SA (CLAREMONT)
Tel: 021/ 670 74 00
Fax: 021/ 671 89 45
CLAREMONT 7700
P O BOX 23557
pennyb@pentravel.co.za

PENZANCE TRAVEL
Tel: 011/ 907 93 00
Fax: 011/ 907 85 63
ALBERTON 1450
P O BOX 1119
lizp.penzancetravel@galileosa.co.za

PHILEAS FOGG TRAVEL
WORLDCHOICE
Tel: 021/ 671 91 13
Fax: 021/ 671 15 84
CLAREMONT 77 35
P O BOX 23947
phileasf.phileasfogg@galileosa.co.za

PIETERMARITZBURG TRAVEL AGENCY
Tel: 033/ 342 36 33
Fax: 033/ 342 46 63
SCOTTVILLE 3502
P O BOX 101196
bettydw.pmbtrav@galileosa.co.za

PINELANDS TRAVEL WORLDCHOICE
Tel: 021/ 531 27 15
Fax: 021/ 531 02 80
HOWARD PLACE 7450
P O BOX 38020
heatherc.pinetravel@galileosa.co.za

PLETTENBERG BAY TRAVEL
Tel: 044/ 533 21 97
Fax: 044/ 533 35 70
PLETTENBERG BAY 6600
P O BOX 777
danielvr.plettravel@galileosa.co.za

PRESTIGE TRAVEL
Tel: 011/ 305 49 00
Fax: 011/ 305 49 49
CRAIGHALL 2024
P O BOX 411719
prestigetravel@galileosa.co.za

PRESTIGE TRAVEL (PINELANDS)
Tel: 021/ 532 27 01
Fax: 021/ 532 27 13
HOWARD PLACE 7450
P O BOX 391
jennyh.prestige@galileosa.co.za

PRESTIGE TRAVEL (PTY)LTD
Tel: 035/ 789 11 15
Fax: 035/ 789 11 19
RICHARDS BAY 3900
P O BOX 98
gaill.prestige@galileosa.co.za

PRETORIA TRAVEL
Tel: 012/ 343 19 20
Fax: 012/ 343 91 29
ARCADIA 7
P O BOX 40050
ps.pretoriatravel@galileosa.co.za

PRIORITY TRAVEL
Tel: 011/ 887 95 65
Fax: 011/ 887 95 68
SANDTON 2146
P O BOX 783091
pamelor.priority@galileosa.co.za

PRo SURE TRAVEL
Tel: 011/ 465 06 07
Fax: 011/ 467 17 36
WITKOOEN 2068
P O BOX 1934
annemariei.protravel@galileosa.co.za

PROSPUR TRAVEL
Tel: 021/ 61 90 40
Fax: 021/ 61 61 06
CLAREMONT 7735
P O BOX 117
prospur@galileosa.co.za

PROTEA TRAVEL
Tel: 011/ 805 31 20
Fax: 011/ 805 38 09
MIDRAND 1685
P O BOX 690
petram.proteatravel@galileosa.co.za

R & M GLOBAL TRAVEL SERVICE
Tel: 011/ 787 10 45
Fax: 011/ 787 04 06
RANDBURG 2125
P O BOX 536
r&mglobal@rttc.co.za

RAINBOW TRAVEL
Tel: 012/ 46 52 06
Fax: 012/ 346 32 44
PRETORIA 1
P O BOX 4356
rainbowtravel@galileosa.co.za

RC NAIK'S TRAVEL SERVICES
Tel: 011/ 482 20 12
Fax: 011/ 482 32 12
PARKLANDS 2121
P O BOX 3131
rcnaik.rcnaiktrvl@galileosa.co.za

RCI SOUTHERN AFRICA
Tel: 011/ 308 05 90
Fax: 031/ 303 37 77
OVERPORT 4067
P O BOX 70263
caroline.culbert@rcitravel.co.za

RCI VACATION EXCHANGES
Tel: 021/ 430 11 11
Fax: 021/ 434 39 11
ROGGEBAAI 8012
P O BOX 7335
azoya@rci.co.za

RCI VACATION EXCHANGES (SANDTON)
Tel: 011/ 258 00 23
Fax: 011/ 258 03 71
SANDTON 2146
P O BOX 783940
dologhlen@rci.co.za

REGENCY TRAVEL
Tel: 011/ 48 33 75 66
Fax: 011/ 483 37 03
JOHANNESBURG 2000
P O BOX 7539
shullaz.regency@galileosa.co.za

RENNIES TRAVEL (NAMIBIA)
Tel: 0926464/ 201 22 07
Fax: 0926464/ 206 7 91
WALVIS BAY
NAMIBIA
P O BOX 4
magda@wts.com.na

RENNIES TRAVEL (773290500)
Tel: 011/ 407 28 00
Fax: 011/ 403 36 98
JOHANNESBURG 2000
P O BOX 9395
kobus.snyman@travel.rennies.co.za

RENNIES TRAVEL (ALBERTON)
Tel: 011/ 907 13 06
Fax: 011/ 907 95 94
ALBERTON 1450
P O BOX 1098
louise.barbard@travel.rennies.co.za

RENNIES TRAVEL (BELLVILLE)
Tel: 021/ 914 91 00
Fax: 021/ 914 91 30
BELLVILLE 7535
P O BOX 563
vanessa.johnson@travel.rennies.co.za

RENNIES TRAVEL (BENONI)
Tel: 011/ 422 48 00
Fax: 011/ 421 21 35
BENONI 1500
P O BOX 1287
michael.millard@travel.rennies.co.za

RENNIES TRAVEL (BFN)
Tel: 051/ 430 23 61
Fax: 051/ 420 64 68
BLOEMFONTEIN 9300
P O BOX 709
beaulah.bam@travel.rennies.co.za

RENNIES TRAVEL (CLAREMONT)
Tel: 021/ 674 20 27
Fax: 021/ 674 23 35
CLAREMONT 7735
P O BOX 24113
janice.keeton@travel.rennies.co.za

RENNIES TRAVEL (CORPORATE)
Tel: 021/ 418 56 26
Fax: 021/ 21 74 45
CAPE TOWN 8000
P O BOX 7
delyth.ryan@travel.rennies.co.za

RENNIES TRAVEL (CORPORATE)
Tel: 011/ 305 65 61
Fax: 031/ 304 04 54
DURBAN 4000
P O BOX 33
kay.pillay@travel.rennies.co.za

RENNIES TRAVEL (CORPORATE)
Tel: 011/ 883 39 00
Fax: 011/ 783 06 65
SANDTON 2146
P O BOX 781446
lundy.arsenis@travel.rennies.co.za

RENNIES TRAVEL (EAST LONDON)
Tel: 043/ 726 06 98
Fax: 043/ 726 07 19
EAST LONDON 5214
P O BOX 19675
mercia.schultz@travel.rennies.co.za

RENNIES TRAVEL (FLORIDA)
Tel: 011/ 472 48 55
Fax: 011/ 472 38 66
FLORIDA HILLS 1716
P O BOX 802
christine.clark@travel.rennies.co.za

RENNIES TRAVEL (GOBIE STR)
Tel: 012/ 348 52 50
Fax: 012/ 47 71 11
PRETORIA 1
P O BOX 1550
howard.thorne@travel.rennies.co.za

RENNIES TRAVEL (HALFWAY HOUSE)
Tel: 011/ 805 16 34
Fax: 011/ 315 26 62
HALFWAY HOUSE 1689
P O BOX 1689
marjopauw@travel.rennies.co.za

RENNIES TRAVEL (ISANDO)
Tel: 011/ 392 40 13
Fax: 011/ 974 69 40
ISANDO 1600
P O BOX 28
marco.christofoli@travel.rennies.co.za

RENNIES TRAVEL (KIMBERLEY)F
Tel: 053/ 831 18 25
Fax: 053/ 833 50 81
KIMBERLEY 8300
P O BOX 512
kendel.van.tonder@travel.rennies.co.za

RENNIES TRAVEL (MONTCLAIR)
Tel: 011/ 469 06 61
Fax: 031/ 469 11 01
MONTCLAIR 4061
P O BOX 33093
jennyflower@travel.rennies.co.za

RENNIES TRAVEL (PARKTOWN NORTH)
Tel: 011/ 880 31 10
Fax: 011/ 788 08 90
SAXONWOLD 2132
P O BOX 52261
sandra.de.luca@travel.rennies.co.za

RENNIES TRAVEL (PE)
Tel: 041/ 363 09 89
Fax: 041/ 363 20 97
GREENACRES 6045
P O BOX 27265
brenda.hughes@travel.rennies.co.za

RENNIES TRAVEL
(PIETERMARITZBURG)
Tel: 0331/ 94 15 71
Fax: 0331/ 42 83 14
DORPSPRUIT 3206
P O BOX 11448
neil.adcock@travel.rennies.co.za

RENNIES TRAVEL (PINETOWN)
Tel: 011/ 701 22 68
Fax: 031/ 702 11 25
PINETOWN 3600
P O BOX 1717
tessa.lee@travel.rennies.co.za

RENNIES TRAVEL (SECUNDA)
Tel: 017/ 610 81 11
Fax: 017/ 610 47 81
SECUNDA 2303
P O BOX 4204

RENNIES TRAVEL (STELLENBOSCH)
Tel: 021/ 887 00 06
Fax: 021/ 883 39 27
STELLENBOSCH 7599
P O BOX 353
maree.steyn@travel.rennies.co.za

RENNIES TRAVEL (UNITAS)
Tel: 011/ 833 14 41
Fax: 011/ 834 88 55
MARSHALLTOWN 2107
P O BOX 61010
pat.pringle@travel.rennies.co.za

RENNIES TRAVEL (VDBIJLPARK)
Tel: 0169/ 31 14 00
Fax: 0169/ 81 57 50
VANDERBIJLPARK 1900
P O BOX 312

RENNIES TRAVEL (YALE)
Tel: 011/ 407 37 11
Fax: 011/ 407 25 53
JOHANNESBURG 2000
P O BOX 31641
gladys.vanderkleij@travel.rennies.co.za

RICA TRAVEL SURE TRAVEL CENTRE
Tel: 011/ 563 26 22
Fax: 031/ 563 20 08
DURBAN NORTH 4016
P O BOX 20318
rikeg.rica@galileosa.co.za

RICHARD BAILEY TRAVEL
Tel: 011/ 447 10 99
Fax: 011/ 422 38 18
CRAIGHALL 22024
P O BOX 41092
johnr@thompsons.co.za

RIDGE SURE TRAVEL
Tel: 012/ 348 34 84
Fax: 012/ 348 14 72
LYNNWOOD RIDGE 40
P O BOX 73984
jennyh.ridgetravel@galileosa.co.za

RIDGEGATE TRAVEL
Tel: 011/ 768 44 40
Fax: 011/ 768 14 70
WESTGATE 1734
P O BOX 7014
seann.ridgegate@galileosa.co.za

RITZREISE
Tel: 0926461/ 23 66 70
Fax: 0926461/ 22 27 57
WINDHOEK
P O BOX 23113
alidao.ritzreise@galileosa.co.za

RMG TRAVEL & TOURS
Tel: 012/ 362 32 55
Fax: 012/ 362 32 58
HATFIELD 28
P O BOX 13268
johans.statravel@workingholidays.co.za

RONDEBOSCH SURE TRAVEL CENTRE
Tel: 021/ 685 30 48
Fax: 021/ 689 17 77
RONDEBOSCH 7701
P O BOX 2558
rontrav@galileosa.co.za

ROSEBANK TRAVEL SERVICE
Tel: 011/ 880 59 54
Fax: 011/ 880 36 01
SAXONWOLD 2132
P O BOX 52394
rosetrav@global.co.za

ROSENBLUTH INTERN (C/T)
Tel: 021/ 418 19 10
Fax: 021/ 418 21 50
CAPE TOWN 8000
P O BOX 1477
anisahb.rosenbluth@galileosa.co.za

ROSENBLUTH INTERN (DBN)
Tel: 031/ 202 78 04
Fax: 031/ 202 78 57
DURBAN 4000
P O BOX 256
marlenec.rosenbluth@galileosa.co.za

ROSENBLUTH INTERN (PE)
Tel: 041/ 581 30 11
Fax: 041/ 581 38 40
PORT ELIZABETH 6000
P O BOX 256
shirleyf.rosenbluth@galileosa.co.za

ROSENBLUTH INTERN (SANDTON)
Tel: 011/ 646 83 26
Fax: 011/ 646 86 13
SANDTON 2146
P O BOX 785620
barbarao@iafrica.com

ROYAL TRAVEL & TOURS
Tel: 031/ 301 30 00
Fax: 031/ 301 30 41
DURBAN 4000
P O BOX 3165
abbasj.royaltravel@galileosa.co.za

ROYAL TRAVEL & TOURS
Tel: 011/ 207 21 13
Fax: 031/ 207 19 37
OVERPORT 4067
P O BOX 70676
rashidm.royalovp@galileosa.co.za

RUSTENBURG TRAVEL
Tel: 014/ 592 82 31
Fax: 014/ 597 12 80
RUSTENBURG 300
P O BOX 1539
diav.rustenburgtravel@galileoda.co.za

SAA CITY CENTER DANA AGENCY
Tel: 01311/ 75 23 35 71
Fax: 01311/ 752 60 60
NELSPRUIT 1200
P O BOX 218
dananlp@galileosa.co.za

SAA CITY CENTER DEUKOM TRAVEL
Tel: 021/ 851 25 43
Fax: 021/ 851 52 60
SOMERSET WEST 7130
P O BOX 3728
yvonnet.deukom@galileosa.co.za

SAA CITY CENTER HATFIELD TRAVEL
Tel: 012/ 362 65 46
Fax: 012/ 362 72 11
ARCADIA 7
P O BOX 57160
hattrav@mweb.co.za

SAA CITY CENTER INDO JET (SANDTON)
Tel: 011/ 884 50 74
Fax: 011/ 783 91 52
BENMORE GARDENS 2010
P O BOX 650096
indojet16@galileosa.co.za

SAA CITY CENTER MAGIC TRAVEL
Tel. 012/ 341 42 07
Fax: 012/ 341 74 44
ARCADIA 7
P O BOX 55506
meganf.magictravel@galileosa.co.za

SAA CITY CENTER MASERU
Tel: 09266/ 31 45 36
Fax: 09266/ 3145 36
MASERU LESOTHO 100
P O BOX 294
mampek.maserutravel@galileosa.co.za

SAA CITY CENTER PARK TOURS
Tel: 012/ 321 62 91
Fax: 012/ 325 67 63
PRETORIA 1
P O BOX 9
marlig.park@galileosa.co.za

SAA CITY CENTER PARK TOURS (ARCADIA)
Tel: 012/ 343 49 23
Fax: 012/ 34 34 15 99
PRETORIA 1
P O BOX 9
robertb.parktravel@galileosa.co.za

SAA CITY CENTER DOMINION TRAVEL
Tel: 011/ 788 77 56
Fax: 011/ 788 71 23
SANDTON 2146
P O BOX 786865
judyk.dominion@galileosa.co.za

SAA CITY CENTER MAGIC TRAVEL (BMF)
Tel: 051/ 436 78 83
Fax: 051/ 436 64 75
DUNHOF 9310
P O BOX 29609
wendya.magictravel@galileosa.co.za

SAA CITY CENTER ESEC & SPORT TRAVEL
Tel: 021/ 21 73 80
Fax: 021/ 419 75 17
ROGGEBAAI 8012
P O BOX 6880
sporttvl@iafrica.com

SAA CITY CNTR TRAVELLERS JOY
Tel: 0283/ 237 02
Fax: 0283/ 225 16
HERMANUS 7200
P O BOX 737
flights@hotmail.com

SAA CITY CNTR WYNBERG EXEC TRAVEL
Tel: 021/ 659 22 20
Fax: 021/ 659 24 48
WYNBERG 7824 P O BOX 18075
maireads.wynbergsacc@galileosa.co.za

SAA CITY CNTR WYNBERG TR (CONSTANTIA)
Tel: 021/ 794 50 43
Fax: 021/ 794 46 52
WYNBERG 7824
P O BOX 18075
candice.wynberg@galileosa.co.za

SANDOWN TRAVEL (SANDTON)
Tel: 011/ 783 55 17
Fax: 011/ 783 38 29
SANDTON 2146
P O BOX 78053
marcoc.sandowntravel@galileosa.co.za

SANTRAV NORWOOD
Tel: 011/ 728 74 31
Fax: 011/ 728 55 45
GRANT PARK 2051 P O BOX 95019
134090@beltel.co.za

SCOTIA TRAVEL
Tel: 011/ 331 86 32
Fax: 011/ 331 15 31
JOHANNESBURG 2000
132 FOX STR
fluffy@worldspan.co.za

SEALANDAIR TRAVEL
Tel: 011/ 422 22 40
Fax: 011/ 422 46 96
BENONI 1500
P O BOX 619
merlew.sealandair@galileosa.co.za

SEEKERS TRAVEL CENTRE (EL)
Tel: 0431/ 379 11 11
Fax: 0431/ 37 25 64
EAST LONDON 5200
P O BOX 456
lesleyc.seekers@galileosa.co.za

SEEKERS TRAVEL CENTRE (PE)
Tel: 041/ 363 40 04
Fax: 041/ 363 40 96
PORT ELIZABETH 6000
P O BOX 4356
sharonm.seekersplz@galileosa.co.za

SEEKERS TRAVEL CENTRE (CAPE
Tel: 021/ 42 13 00
Fax: 021/ 419 65 31
ROGGEBAAI 8012
P O BOX 76966
joanned.seekerscape@galileosa.co.za

SEEKERS TRAVEL WORLD
Tel: 011/ 790 00 00
Fax: 011/ 790 00 99
NORTHLANDS 2116
P O BOX 5221
ramong.seekers@galileosa.co.za

SENATOR TRAVEL
Tel: 011/ 880 21 25
Fax: 011/ 880 22 55
SAXONWOLD 2132
P O BOX 1940
senator.travel@amadeus.co.za

SHELLY TRAVEL
Tel: 039/ 315 63 30
Fax: 039/ 315 61 87
ST MICHAELS ON SEA 4265
P O BOX 692
edb.shellytravel@galileosa.co.za

SHEPPIE SURE TRAVEL CENTRE
Tel: 039/ 682 17 17
Fax: 039/ 682 54 09
PORT SHEPSTONE 4240
P O BOX 1539
janetg.sheppietravel@galileosa.co.za

SKYLINK TRAVEL
Tel: 011/ 305 54 01
Fax: 031/ 304 21 86
DURBAN 4000
P O BOX 1270
babsb.skylink@galileosa.co.za

SOMERSET SURE TRAVEL
Tel: 021/ 794 77 07
Fax: 021/ 794 77 07
SOMERSET WEST 7129
P O BOX 625
dparry@iafrica.com

SOUTH CAPE TRAVEL
Tel: 0448/ 74 69 30
Fax: 0448/ 73 58 46
GEORGE 6530
P O BOX 1594
lindas.southcapetravel@galileosa.co.za

SOUTHLAKE TRAVEL
Tel: 012/ 663 65 65
Fax: 012/ 663 48 80
HENNOPSMEER 46
P O BOX 9133

STAR TRAVEL
Tel: 021/ 461 25 34
Fax: 021/ 461 24 67
CAPE TOWN 8000
P O BOX 3403
luigie@startravel.co.za

STAR LIGHT TRAVEL
Tel: 011/ 807 51 11
Fax: 011/ 807 50 85
SANDTON 2146
P O BOX 786331
starlite@galileosa.co.za

STATUS TRAVEL
Tel: 045/ 839 30 29
Fax: 045/ 839 40 08
QUEENSTOWN 5320
P O BOX 460
esteh.status@galileosa.co.za

STELLENBOSCH SURE TRAVEL
Tel: 021/ 887 29 20
Fax: 021/ 887 16 89
STELLENBOSCH 7599
P O BOX 118
richardd.steltrav@galileosa.co.za

SUPERSONIC TRAVEL
Tel: 012/ 341 14 81
Fax: 012/ 341 14 80
ARCADIA 7
P O BOX 26032
super@smartnet.co.za

SUPERSONIC TRAVEL (CHARLES)
Tel: 012/ 346 41 97
Fax: 012/ 346 17 69
ARCADIA 7
P O BOX 26032
petroeg.supersonictravel@galileosa.co.za

SURE TRAVEL MANAGEMENT
CENTRE
Tel: 011/ 484 31 17
Fax: 011/ 484 31 69
AUCKLAND PARK 2092
P O BOX 91247
hotelconf@acenet.co.za

SURE TRAVEL QUINN WELKOM
Tel: 057/ 352 22 02
Fax: 057/ 353 36 45
MORESKOF 9462
P O BOX 30547
merryf.quinn@galileosa.co.za

SURE WITBANK TR (HIGHLAND MEWS)
Tel: 013/ 692 50 31
Fax: 013/ 697 18 83
WITBANK 1035
P O BOX 142
ursulas/klipsure@galileosa.co.za

SURE WITBANK TRAVEL
Tel: 013/ 656 65 36
Fax: 013/ 656 52 38
WITBANK 1035
P O BOX 142
marys.witbanktravel@galileosa.co.za

TANGNEY TOURS & TRAVEL
Tel: 021/ 683 03 00
Fax: 021/ 683 08 57
RONDEBOSCH 7700
P O BOX 273
tangney@icon.co.za

TEMBA TRAVEL
Tel: 021/ 853 38 72
Fax: 021/ 853 38 11
SOMERSET WEST 7129
P O BOX 1515
aerwee@temba.co.za

TERRA TRAVEL
Tel: 011/ 884 99 88
Fax: 011/ 884 99 89
SANDTON 2146
P O BOX 78846
heidih.terrajnb@galileosa.co.za

TERRA TRAVEL (RONDEBOSCH)
Tel: 021/ 686 41 36
Fax: 021/ 685 48 14
RONDEBOSCH 7700
92 CAMPGROUND RD
badieah.terracape@galileosa.co.za

THE TRAVEL AGENT
Tel: 043/ 726 53 23
Fax: 043/ 726 37 55
EAST LONDON 5200
P O BOX 1466
isak.thetravelagent@galileosa.co.za

THE TRAVEL AGENT (KINGWT)
Tel: 0436/ 43 40 37
Fax: 0436/ 43 40 39
KING WILLIAMS TOWN 5600
P O BOX 2050
traceys.thetravelagent@galileosa.co.za

THE TRAVEL CHAIN
Tel: 04438/ 211 61
Fax: 04439/ 229 89
KNYSA 6570
P O BOX 80
travelchain.kny@pixie.co.za

THE TRAVEL COMPANY
Tel: 011/ 884 79 80
Fax: 011/ 783 75 29
SANDTON 2146
P O BOX 782635
travelco@worldspan.co.za

THE TRAVEL SCENE
Tel: 011/ 975 07 14
Fax: 011/ 975 01 15
KEMPTON PARK 1620
P O BOX 7195
chrisnak.travelscene@galileosa.co.za

THE TRAVEL WAREHOUSE
Tel: 021/ 762 84 10
Fax: 021/ 762 84 12
WYNBERG 7824
P O BOX 18088
doloresr.travelwarehouse@galileosa.co.za

THOMPSONS CORPORATE TRAVEL
Tel: 011/ 327 06 60
Fax: 011/ 880 46 92
CRAIGHALL 2024
P O BOX 41032
sandras@thompsons.co.za

TITCH TRAVEL
Tel: 021/ 689 41 51
Fax: 021/ 689 37 60
RONDEBOSCH 7701
P O BOX 671
titche@iafrica.com

TOEROPA TRAVEL
Tel: 012/ 362 58 91
Fax: 012/ 362 59 22
PRETORIA 1
P O BOX 4320
travel@toeropa.co.za

TOPFLIGGHT TRAVEL CONSULTANTS
Tel: 031/ 202 53 00
Fax: 031/ 202 53 09
DURBAN 4000
P O BOX 382
top.topflighhttravel@galileosa.co.za

TRANSWORLD TRAVEL
Tel: 011/ 802 68 20
Fax: 011/ 802 68 52
WENDYWOOD 2144
P O BOX 130
ericw.gentravel@galileosa.co.za

TRAVEL BUREAU BLEEKER
Tel: 011/ 484 18 80
Fax: 011/ 484 29 31
JOHANNESBURG 2000
P O BOX 3514
donaldp.bleeker@galileosa.co.za

TRAVEL CONNECTIONS
Tel: 011/ 880 58 80
Fax: 011/ 880 28 46
PARKLANDS 2121
P O BOX 1504
gigs.travcon@galileosa.co.za

TRAVEL CONNECTIONS (SANDTON)
Tel: 011/ 784 43 79
Fax: 011/ 784 43 86
BENMORE 2010
P O BOX 653065
gigs.travcon@galileosa.co.za

TRAVEL CREATIONS
Tel: 011/ 234 19 99
Fax: 011/ 234 21 01
RIVONIA 2128
P O BOX 5587
joyg@creation.co.za

TRAVEL EVE
Tel: 031/ 561 10 50
Fax: 031/ 561 10 52
UMHLANGA ROCKS 4320
P O BOX 542
evee.traveleve@galileosa.co.za

TRAVEL EXPERIENCE
Tel: 057/ 353 30 41
Fax: 057/ 357 20 87
WELKOM 9460
P O BOX 1798
travexp@global.co.za

TRAVEL HERITAGE
Tel: 011/ 320 41 21
Fax: 011/ 320 42 20
BENMORE 2010
P BAG X 11
travel.heritage@amadeus.co.za

TRAVEL INNOVATIONS
Tel: 011/ 880 12 28
Fax: 011/ 880 36 75
NORTHLANDS 2116
P O BOX 877
innovations2.innovations@galileosa.co.za

TRAVEL LEAGUE
Tel: 011/ 784 70 41
Fax: 011/ 784 71 01
2015
P BAG X 11
gails.travlleague@galileosa.co.za

TRAVEL RENDEZVOUS TRUST
Tel: 012/ 362 32 20
Fax: 012/ 326 32 25
HATFIELD 28
P O BOX 11706
rhoma.vannierkerk@uniglobe.co.za

TRAVEL STUDIO
Tel: 012/ 362 18 06
Fax: 012/ 362 26 34
SUNNYSIDE 132
P O BOX 27727
lauriew.travelstudio@galileosa.co.za

TRAVEL UNLIMITED WORLDCHOICE
Tel: 021/ 423 60 16
Fax: 021/ 424 68 86
CAPE TOWN 8000
P O BOX 1186
rashidagtunltda@galileosa.co.za

TRAVEL UNLIMITED WORLDCHOICE (ATHLONE)
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Fax: 021/ 696 84 32
CAPE TOWN 8000
P O BOX 1186
travelu1.tunilda@galileosa.co.za

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Fax: 033/ 394 45 17
DORPSPRUIT 3206
P O BOX 11436
johanb.travelwithus@galileosa.co.za

TRAVEL WORLD 2000
Tel: 0475/ 31 20 11
Fax: 0475/ 31 20 14
UMTATA EC
P O BOX 928
adeles.travelworld2000@galileosa.co.za

TRAVEL XCELLENCE
Tel: 011/ 787 03 31
Fax: 011/ 787 03 52
RANDBURG 2125
P O BOX 4735
sofies.travelx@galileosa.co.za

TRAVELLERS CHOICE
Tel: 011/ 442 45 72
Fax: 011/ 442 45 73
BRAAMFONTEIN 2017
P O BOX 31128
res@t.choice.co.za

TRAVELMANIA SURE TRAVEL
Tel: 021/ 790 77 00
Fax: 021/ 790 74 02
HOUTBAY 7872
P O BOX 26403
lindadb.travelmania@galileosa.co.za

TRAVELMASTER
Tel: 011/ 315 42 42
Fax: 011/ 315 44 46
HALFWAY HOUSE 1685
P O BOX 444
ivan.travelmaster@galileosa.co.za

TRAVELWAYS SURE inc PENTHOUSE TRAVEL
Tel: 021/ 21 56 70
Fax: 021/ 25 23 00
CAPE TOWN 8000
P O BOX 193
pamb.travelways@galileosa.co.za

TRAVELWAYS SURE TRAVEL (DURBANVILLE)
Tel: 021/ 96 81 10
Fax: 021/ 96 04 11
HOWARD PLACE 7450
P O BOX 164
thomasv.travelways@galileosa.co.za

TRAVELWAYS SURE TRAVEL (PINELANDS)
Tel: 021/ 531 76 08
Fax: 021/ 531 70 13
HOWARD PLACE 7450
P O BOX 164
travpent@mweb.co.za

TRAVELWAYS SURE TRAVEL (TABLE VIEW)
Tel: 021/ 557 39 91
Fax: 021/ 557 84 41
BLOUBERGRANT 7443
P O BOX 11034
danielad.travelways@galileosa.co.za

TRAVKOR (ARCADIA)
Tel: 012/ 323 48 81
Fax: 012/ 323 63 97
ARCADIA 7
P O BOX 40758
travpry@cis.co.za

TRAVKOR (KNYSNA)
Tel: 0443/ 82 58 58
Fax: 0443/ 82 68 04
KNYSNA 6570
P O BOX 2495
retham.travkor@galileosa.co.za

TRAVKOR (SANDTON)
Tel: 011/ 883 78 03
Fax: 011/ 883 67 54
BENMORE 2010
P O BOX 651844
antheag.travkor@galileosa.co.za

TRAVKOR SURE (CAPE TOWN)
Tel: 021/ 418 20 71
Fax: 021/ 419 43 35
CAPE TOWN 8000
P O BOX 831
siraazk.travkor@galileosa.co.za

TREND TRAVEL WORLDCHOICE
Tel: 021/ 715 25 74
Fax: 021/ 715 25 90
PLUMSTEAD 7801
P O BOX 471
kirkwood@netactive.co.za

TRIGON SURE TRAVEL CENTRE
Tel: 021/ 421 47 10
Fax: 021/ 419 11 80
CAPE TOWN 8000
P O BOX 2485
elizabethv.trigontravel@galileosa.co.za

TRIP TRAVEL
Tel: 0926461/ 23 68 80
Fax: 0926461/ 225 46
WINDHOEK
P O BOX 1002
mats.triptravel@galileosa.co.za

TRIPOS SURE TRAVEL CAPE
Tel: 021/ 689 89 62
Fax: 021/ 686 68 21
RONDEBOSCH 7700
P O BOX 32
gillesc.parestravel@galileosa.co.za

TRIPOS TRAVEL
Tel: 011/ 880 60 80
Fax: 011/ 880 43 94
PARKLANDS 2121
P O BOX 1567
maggier.triposjnb@galileosa.co.za

TRIUMPH SURE TRAVEL (GARDENS)
Tel: 021/ 465 18 38
Fax: 021/ 465 61 84
MILLSTREET 8010
P O BOX 12115
shelleyw.triumphtravel@galileosa.co.za

TRIUMPH SURE TRAVEL (MILNERTON)
Tel: 021/ 552 49 17
Fax: 021/ 551 16 16
MILNERTON 7435
P O BOX 1798
michellek.triumphtravel@galileosa.co.za

TRIUMPH SURE TRAVEL (SEA POINT)
Tel: 021/ 439 61 25
Fax: 021/ 439 76 09
SEA POINT 8060
P O BOX 11034
triumpht@galileosa.co.za

TURBO TRAVEL
Tel: 011/ 880 60 30
Fax: 011/ 880 58 68
PARKLANDS 2121
P O BOX 1065
ttravel@iafrica.com

TURN KEY TRAVEL
Tel: 01524/ 44 92
Fax: 01524/ 852 35
PHALABORWA 1390
P O BOX 647
margiel.turnkeytravel@galileosa.co.za

TURNERS TRAVEL (DBN)
Tel: 031/ 332 14 51
Fax: 031/ 332 57 09
DURBAN 4000
P O BOX 1935
turner17@galileosa.co.za

TURNERS TRAVEL (ESHOWE)
Tel: 035/ 474 23 05
Fax: 035/ 474 49 36
ESHOWE 3815
P O BOX 384
terrym.turners@galileosa.co.za

TURNERS TRAVEL (SCOTTSBURGH)
Tel: 039/ 976 13 17
Fax: 039/ 978 16 84
SCOTTBURGH 4180
P O BOX 8610
hollym.turners@galileosa.co.za

TYGERBERG TRAVEL
Tel: 021/ 919 08 88
Fax: 021/ 919 08 90
TYGERPARK 7536
P O BOX 3742
charnelleg.travops@galileosa.co.za

UDOMO TRAVEL WORLDCHOICE
Tel: 021/ 762 45 81
Fax: 021/ 762 47 84
GATESVILLE 7766
P O BOX 302
tofeegh.udomo@galileosa.co.za

UNIGLOBE ALLIANCE TRAVEL
Tel: 012/ 322 72 66
Fax: 012/ 322 36 67
WENDYWOOD 2144
P O BOX 76225

UNIGLOBE ALLIANCE TRAVEL (PINETOWN)
Tel: 031/ 701 07 04
Fax: 031/ 701 10 86
PINETOWN 3600
P O BOX 2811
karenf.harveyuniversal@galileosa.co.za

UNIGLOBE ALLIANCE TRAVEL (BEREA)
Tel: 031/ 202 93 25
Fax: 031/ 202 93 31
DURBAN 4000
P O BOX 3081
carolyn.brymer@uniglobe.co.za

UNIWORLD TRAVEL SERVICES
Tel: 011/ 886 93 70
Fax: 011/ 886 93 07
JOHANNESBURG 2000
P O BOX 1062
clausdm.uniworld@galileosa.co.za

VACATION UNLIMITED
Tel: 012/ 342 01 79
Fax: 012/ 430 38 40
PRETORIA 1
P O BOX 1471

VEREENIGING TOP TRAVEL
Tel: 016/ 21 37 53
Fax: 016/ 55 33 90
VEREENIGING 1930
P O BOX 1011

VICTORIA SURE TRAVEL
Tel: 021/ 447 30 24
Fax: 021/ 447 73 80
WOODSTOCK 7915
P O BOX 133
harold@worldspan.co.za

VITA TRAVEL & TOURS
Tel: 021/ 422 23 41
Fax: 021/ 422 24 23
CAPE TOWN 8000
P O BOX 3543
carlop.vita@galileosa.co.za

VIVA TRAVELS (PRETORIA)
Tel: 012/ 460 17 17
Fax: 012/ 460 17 74
GROENKLOOF 27
P O BOX 1722
mike.viva@galileosa.co.za

VIVA TRAVELS (TZANEEN)
Tel: 0152/ 307 31 18
Fax: 0152/ 307 31 01
TZANEEN 850
P O BOX 3341
eiiy.viva@galileosa.co.za

VOYAGER TRAVEL
Tel: 031/ 202 67 10
Fax: 031/ 21 10 67
DURBAN 4000
P O BOX 4253
janeta.voyagertravel@galileosa.co.za

VRYHEID TRAVEL HOUSE
Tel: 034/ 981 39 11
Fax: 034/ 981 39 13
VRYHEID 3100
P O BOX 218
joanl.travelhouse@galileosa.co.za

VRYHEID TRAVEL HOUSE (DUNDEE)
Tel: 03421/ 22 11
Fax: 03421/ 224 27
DUNDEE 3000
P O BOX 3
travelhouse.travelhouse@galileosa.co.za

WEMBLEY TRAVEL & TOURS
Tel: 021/ 697 14 36
Fax: 021/ 696 84 36
GATESVILLE 7766
P O BOX 300
rashidb.wembleytravel@galileosa.co.za

WESTWOOD SURE TRAVEL
Tel: 021/ 851 69 08
Fax: 021/ 852 46 55
SOMERSET WEST 7129
P O BOX 826
info@westwood.co.za

WIDE HOROZONS TRAVEL
WORLDCHOICE
Tel: 021/ 683 31 53
Fax: 021/ 683 32 53
NEWLANDS 7725
P O BOX 103
kenl.wideht@galileosa.co.za

WILDERNESS SAFARIS
Tel: 011/ 883 07 47
Fax: 021/ 883 09 11
SANDTON 2146
P O BOX 78573
charlesc@sdn.wilderness.co.za

WILDERNESS SAFARIS
Tel: 011/ 807 18 00
Fax: 021/ 807 21 10
RIVONIA 2128 P O BOX 5219
charlesc@sdn.wilderness.co.za

WILLARDS TRAVEL
Tel: 043/ 642 15 88
Fax: 043/ 643 39 10
KING WILLIAMS TOWN 5600
P O BOX 1088
tanyab.willards@galileosa.co.za

WOKER TRAVEL SERVICES
(WINDHOEK)
Tel: 09264/ 61 23 79 46
Fax: 09264/ 612 25 93
WINDHOEK
NAMIBIA
P O BOX 211
ankeb.wokerswdh@galileosa.co.za

WORLD TRAVEL (WWOMEAD)
Tel: 011/ 802 68 20
Fax: 011/ 802 68 52
BRAMLEY 2018
P O BOX 391401
lucindam.gentravel@galileosa.co.za

WORLD TRAVEL (BRAAMFONTEIN)
Tel: 011/ 339 54 22
Fax: 011/ 339 28 19
JOHANNESBURG 2000
P O BOX 8096
sharonb.gentravel@galileosa.co.za

WORLD TRAVEL (DURBAN)
Tel: 031/ 207 43 43
Fax: 031/ 207 43 49
DURBAN 4000
P O BOX 2227
paulines.gentravel@galileosa.co.za

WORLD TRAVEL (PE)
Tel: 041/ 365 23 44
Fax: 041/ 365 23 45
NEWTON PARK 6045
P O BOX 34654
phyllisa.atkinsons@galileosa.co.za

WORLD TRAVEL (SILVERTON)
Tel: 012/ 804 58 90
Fax: 012/ 804 39 43
SILVERTON 127
P O BOX 912031
geraldine.wallace@genfood.co.za

WORLD TRAVEL (WADEVILLE)
Tel: 011/ 827 93 27
Fax: 011/ 450 26 30
WADEVILLE 1422
P O BOX 14256

WORLD TRAVEL AGENCY (C/T)
Tel: 021/ 25 24 70
Fax: 021/ 21 78 68
CAPE TOWN 8000
P O BOX 2889
yvonne.worldtravelcpt@galileosa.co.za

WORLD TRAVEL AGENCY (JHB)
Tel: 011/ 403 26 06
Fax: 011/ 403 10 37
JOHANNESBURG 2000
P O BOX 4568
benl@galileosa.co.za

WORLD TRAVEL GTM
Tel: 021/ 418 43 20
Fax: 021/ 21 47 75
CAPE TOWN 8000 P O BOX 598
dawns.gentravel@galileosa.co.za

5.3. ASATA TOURIST-GENERATING TOUR OPERATORS IN SOUTH AFRICA

ABSOLUTE TOURS
Tel: 011/ 458 16 00
Fax: 011/ 455 28 18
BEDFORDVIEW 2008 P O BOX 1633
management@absolutetours.co.za

ABSOLUTE TOURS (C/T)
Tel: 021/ 418 12 93
Fax: 021/ 419 67 38
CAPE TOWN 8001
66 STRAND STR

AIR HOLIDAYS
Tel: 011/ 803 82 23
Fax: 011/ 803 80 76
BENMORE 2010 P O BOX 652769
reservations@airholidays.co.za

ATO (CAPE TOWN)
Tel: 021/ 421 18 52
Fax: 021/ 418 26 71
CAPE TOWN 8000 P O BOX 5605
www@ato.co.za

ATO (JHB)
Tel: 011/ 880 05 62
Fax: 011/ 880 57 02
JOHANNESBURG 2000 P O BOX 6266
keith@ato.co.za

BEACHCOMBER TOURS
Tel: 021/ 852 88 22
Fax: 021/ 852 63 77
SOMERSET WEST 7129 P O BOX 745
beachcomber@galileosa.co.za

BREAKWAY TRAVEL & TOURS
Tel: 011/ 884 49 52
Fax: 011/ 884 41 52
RIVONIA 2128
P O BOX 2416
vall.breakaway@galileosa.co.za

CLUB MED
Tel: 011/ 442 52 52
Fax: 011/ 442 50 36
PARKLANDS 2121
P O BOX 1488
sales@clubmed.co.za

HOLIDAY TOURS (RANDBURG
Tel: 011/ 289 81 60
Fax: 011/ 886 44 60
RANDBURG 2125
P O BOX 4942
corporate@holidays.co.za

IN VOGUE TOURS
Tel: 011/ 483 37 00
Fax: 011/ 483 25 31
ORANGE GROVE 2119
P O BOX 46241
invogue@iafrica.com

INSIGHT VACATIONS (SA) (PTY) LTD
Tel: 011/ 280 84 00
Fax: 011/ 280 84 10
CRAIGHALL 2024
P O BOX 413786
riaang@insightvacations.co.za

ISRAELI TAILORED TOURS (ITT)
Tel: 031/ 202 82 81
031/ 202 83 81
MAYVILLE 4058
P O BOX 30015
itt@tc.co.za

LEADING TOURS
Tel: 011/ 886 28 12
Fax: 011/ 886 28 42
RANDBURG 2125
P O BOX 2506
sarah@li.co.za

PROTRAV
Tel: 011/ 784 37 00
Fax: 011/ 784 15 90
BENMORE 2010
P O BOX 651771
protrav@global.co.za

SCOTTS HOLIDAYS
Tel: 031/ 202 52 60
Fax: 031/ 202 52 75
MUSGRAVE ROAD 4062
P O BOX 50566
scotts@scotts.co.za

THOMPSONS CAPE
Tel: 021/ 419 97 50
Fax: 011/ 419 07 40
CAPE TOWN 8000
P O BOX 382
kateh@thompsons.co.za

THOMPSONS TOURS
Tel: 031/ 202 61 30
Fax: 031/ 202 11 96
MUSGRAVE ROAD 4062
P O BOX 51041
clairew@thompsons.co.za

THOMPSONS TOURS
Tel: 011/ 770 77 00
Fax: 011/ 442 73 11
CRAIGHALL 2024
P O BOX 41032
moiras@thompsons.co.za

TRAFALGAR TOURS
Tel: 011/ 784 46 00
Fax: 011/ 784 49 37
BENMORE 2010
P O BOX 652112
theresamc@yebo.co.za

TRAVEL VISION
Tel: 011/ 482 52 22
Fax: 011/ 482 60 43
JOHANNESBURG 2000
P O BOX 4779
roy@tvision.co.za

TRAVELLERS CHOICE
Tel: 011/ 442 45 72
Fax: 011/ 422 45 73
BRAAMFONTEIN 2017
P O BOX 31128
jim@t-choice.co.za

TRAVELPASS INTERNATIONAL
Tel: 011/ 622 38 92
Fax: 011/ 622 25 16
GARDENVIEW 2047
P O BOX 751104
travpass@icon.co.za

WILD FRONTIERS
Tel: 011/ 315 48 38
Fax: 011/ 315 48 50
HALFWAY HOUSE 1685
P O BOX 844
debbie@wildfrontiers.com

WILDERNESS SAFARIS
Tel: 011/ 807 18 00
Fax: 011/ 807 21 10
RIVONIA 2128
P O BOX 5219
olgac@wilderness.co.za

WORLD LEISURE HOLIDAYS
Tel: 011/ 285 25 00
Fax: 011/ 285 24 04
RANDBURG 2125
P O BOX 1474
bruce@wlh.co.za

5.4. EUROPEAN TRAVEL GUIDES

Michelin
Michelin Editions du Voyage
46 Av de bretagne
75324 Paris Cedex 07
Web: michelin-travel.com

Globetrotter
Globetrotter
80 Mc Kenzie Street
Cape Town 8001
South Africa

Eyewitness travel Guides
Eyewitness
9 Henrietta Street
London WC2E 8PS
Web: www.dk.com

The Rouge Guide to…
Penguin Group Ltd
27 Wrights Camp
London W8 5TZ

Frommer's Guides
Frommers
Web: frommers.travelocity.com

Let's Go
Let's go
25 Eccleston Place
London SWIW PNF
Web: letsgo.com

Lonely Planet Guides
Lonely Planet
10a Spring Place
London NWS 3BH
Web: lonelyplanet.com

Dorling Kindersley Travel Guides
Dorling Kindersley
9 Henrietta Street
London WCZE 8P5

A travel guide to Jewish Europe
Pelican Publishing Cia
1000 Burmaster Street – Gretna Louisiana

Classic short breaks in Europe
Thomas Cook Publications
P O Box 227 – Thorpe Wood
Peterborough PE3 6PU – UK

National Parks in Europe
Activity Series- The ENDAT Group
Orchid House – Springkerse Business Park
– Stirling FK7 7XE – Scotland

Walk Europe
Activity Series- The ENDAT Group
Orchid House – Springkerse Business Park
– Stirling FK7 7XE – Scotland

Fodor's Europe 2000
Fodor's Travel Publications
20 Vauxhall bridge Rd
London SW1V 2SA
England

Europe by Train
Katie Wood
Robson Books
10 Blenheim Court
Brewery Rd, London N7 9NT

Cheap Sleeps Europe
Katie Wood, Robson Books
10 Blenheim Court
Brewery Rd
London N7 9NT

Independent Traveller's Europe 2000
Tim Locke, Thomas Cook Publications
P O Box 227 – Thorpe Wood
Peterborough PE3 6PU – UK

Europe Ports of Call
Fodor's travel Publications
20 Vauxhall bridge Rd
London SW1V 2SA
England

A great weekend in…
Hachette
Cassell 8 Co, Wellington house, 125 Strand
London WC2 ROBB

Routard
Hachette
Cassell 8 Co, Wellington house, 125 Strand
London WC2 ROBB

Independent Hostel Guide (Britain & Europe)
Backpackers Press Publications
2 Rockview Cottages temple Walk –
Martlock Bath Derbyshire DE4 3PG

Berlitz Pocket Guide
Berlitz Publishing Company
9-13 Grosvenor Street
London W1X 9FB – UK

Insight Guide
APA Publications GmbH & Co
38 Joo Koon Rd
Singapore 628990

Time Out Guide
Penguin Books
27 Wrights Camp
London W8 5TZ

City Pack
AA World Travel Guides
Norfolk House, Priestly Rd
Basingstoke, Hampshire RG24 9NY

Map of Europe
Harper Collins Publishers
77-85 Fulham Place Rd, Hammersmith
London W68JB

5.5. EUROPEAN TOURIST OFFICES BELONGING TO ANTOR

British Tourist Authority
P O Box 41898
Craighall 2024
Tel: 2711/ 325 03 42
Fax: 2711/ 325 03 44
Nmillar@bta.org.uk y www.visitbritain.com

French Tourist Office
P O Box 41022
Craighall 2024
Tel: 2711/ 880 80 62
Fax: 2711/ 770 16 66
www.frenchdoor.co.za

German National Tourist Office
P O Box 10883
Johannesburg 2000
Tel: 2711/ 643 1615
Fax: 2711/ 484 27 50
www.germany-tourism.de